

## 15. Housekeeping – cancelling articles, replication, favorite bookmarks, updating an index

This section instructs you in the fundamentals of managing your content.

**Note:**

“Favorite” is spelled the US way as this is how it appears in Lotus Notes.

### 15.1 OBJECTIVES

By the end of this chapter you should be able to:

- cancel an article
- replicate your databases
- see when databases have been most recently replicated
- replicate only email
- add your most commonly used databases to your Favorite bookmarks
- update index of articles.

### 15.2 CANCELLING AN ARTICLE

Sometimes after an article has been started it will no longer be required.

**Cancel NOT delete**

It is important to **cancel** the article, and NOT delete it, so that a record of the article remains.

Cancelling an article is done in the article’s workflow. Cancelling means that there is still a record of the article having been commissioned, the author to whom it was briefed and the copy that was written. If you delete the article all information about the article is deleted.

For example, your editor has commissioned an article about sports cars. There is an overview of the cars, each author has written an article about a car and there is a separate sidebox comparing the cars discussed. It has now been decided that only the sidebox will be retained, and the separate articles are no longer required.

1. Open the article to be cancelled.
2. Go into **Edit** mode.
3. Go to the **Workflow** tab.
4. Click on the dropdown arrow next to **Copy status**:
5. Select *Cancelled*.

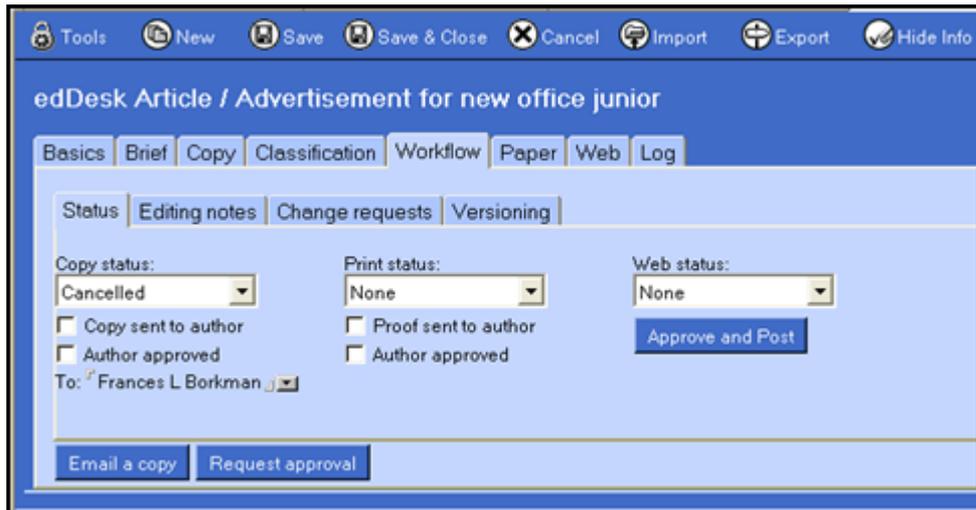


Figure 150: Workflow tab for an article. Change the copy status to Cancelled.

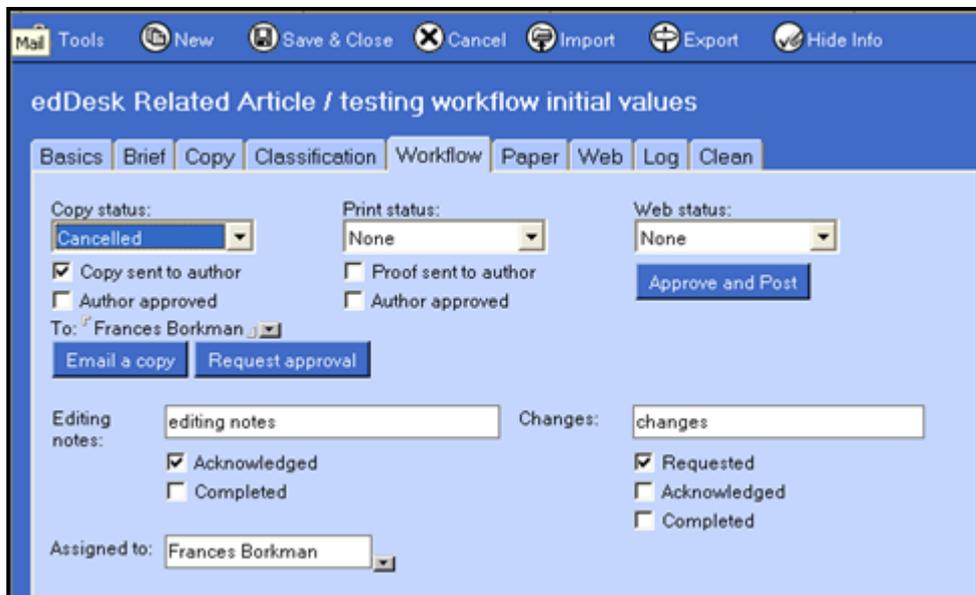


Figure 151: Workflow tab for a related article / subarticle. Change the Copy status to Cancelled.

6. Click on <Save & Close>.

Views now list the article with a copy status of *Cancelled*.

The screenshot shows a Lotus Notes search view titled "Search in View 'ContentAll by section'". The interface includes a search bar and a toolbar with buttons for New, Forward, Edit, Search Bar, Expand, Collapse, and Folder. The search results are displayed in a table with columns for date, title, copy status, and author. The table is organized into sections: Corporate, Administration, Human Resources, Resources, Reference materials, and Manuals. One article in the Human Resources section is highlighted with a red background and has a "Cancelled" status.

			Copy Status	Auth
▼ Corporate				
▶ Administration				
▼ Human Resources				
01/05/2005	Advertisement for new office junior		Cancelled	Franc
▼ Resources				
▼ Reference materials				
25/05/2005	▼ Acme corporation submits patent for dynamite		Concept	Franc
01/04/2005	Subarticle: testing workflow initial values (Frances Borkman) [Cancelled]			
▼ Manuals				
	Setup tab: Creating new issue definitions		Concept	Franc
01/04/2005	▼ Acme corporation reports fall in value of rocky canyons		Briefed	Franc
	Comment: comment on Acme's holdings of rocky canyons (Frances Borkman)			
01/04/2005	Subarticle: New Related Article (Frances Borkman) [Concept]			
01/12/2004	▼ Digital camera review		Concept	Franc
01/12/2004	Subarticle: Camera 1 (Frances Borkman) [Concept]			

Figure 152: View All Sections showing "Copy Status" of cancelled for the cancelled article

### 15.3 REPLICATION

Replication is the process of synchronising two databases. It is used if you have Lotus Notes on your own computer and are not always logging directly into your organisation's computer. This is a common situation if you are working away from the office. Your local copy of Notes will be set up by your administrator to automatically replicate your databases throughout the day.

For example you often work from home and have Notes on your home computer. It is faster to use your own local version of the database to write and edit copy. (This is because your computer does not have to communicate with your work servers.) Your local Lotus Notes would be set up to replicate your databases several times a day.

Replication ensures that both you and everyone else in your organisation are working with the most current information in your databases.

Replication is done on the **Replicator** page.

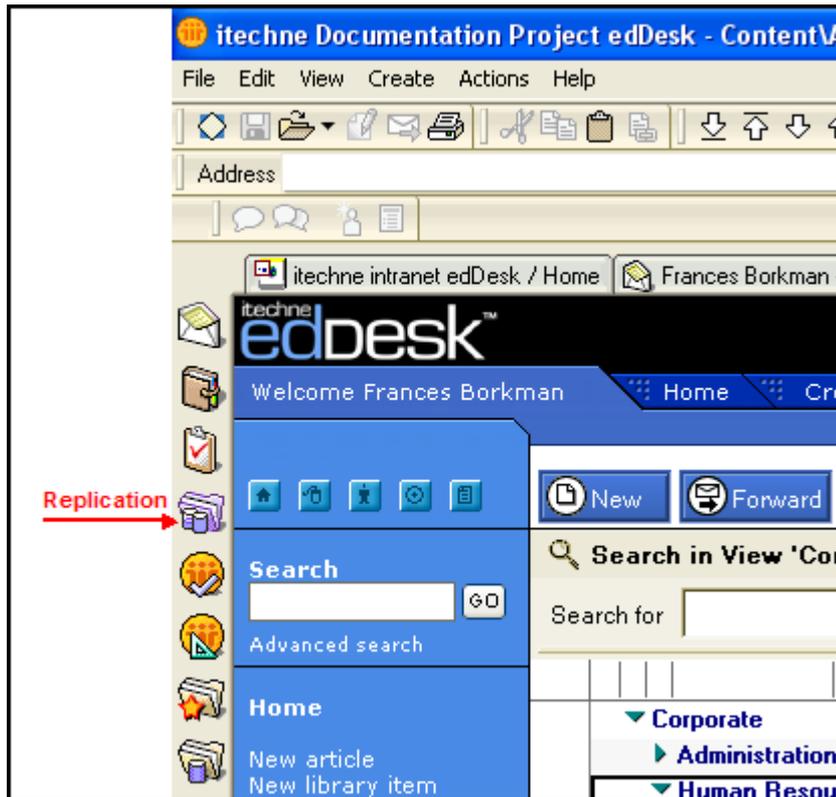


Figure 153: Replication icon highlighted in the Bookmark bar

1. Look at the bar running down the left side of your Notes screen. (Notes calls this the Bookmark bar.)
2. Click on the replication icon .
3. The **Replicator** page displays.

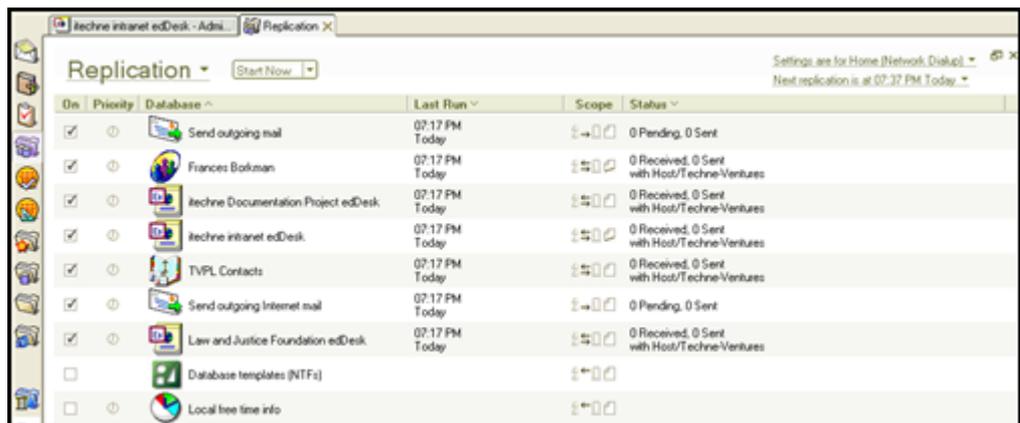


Figure 154: The Replicator page.

4. Information displayed includes:

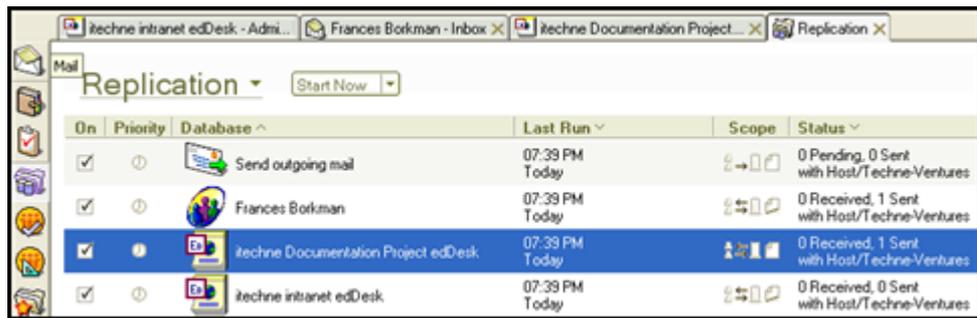


Figure 155: Closer view of the replicator page settings with the itechne Document Project edDesk database selected.

- **On:** whether the item listed will be replicated.
- **Priority:** lets you view settings for your items. There is no need for most people to look at this.
- **Database:** which databases are included in the replication process.
- **Last Run:** when the replication last occurred.
- **Scope:** indicates whether you are sending information to your server , receiving information  or both .
- **Status:** How many items have been Received and Sent and the name of the server that you are sending to and receiving from.

**i Start now**

Sometimes you will want to manually start a replication of all or some of your databases. This is likely if you have created or edited several articles and want to ensure that others in your organisation can see the changes you have made.

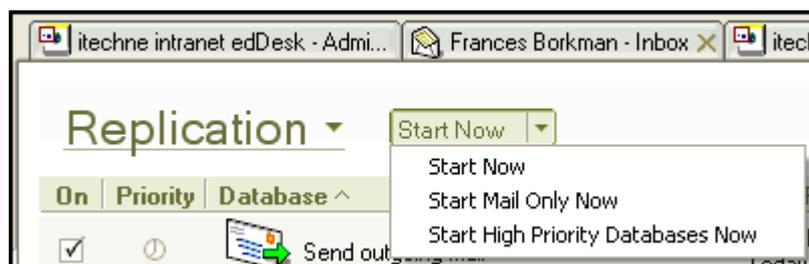


Figure 156: Replicator page using the Start Now menu to force a replication now as well as when it is normally scheduled.

**Selecting a single database to replicate**

1. Click on the database you want to replicate.
2. Click on **Start Now**.
3. Select *Start Now*.

### **Selecting to replicate mail only**

1. Click on **Start Now**.
2. Select *Start Mail Only Now*.

### **Replicating high priority databases.**

Your administrator will decide which databases are high priority.

1. Click on **Start Now**.
2. Select *Start High Priority Databases Now*.

## **ii When is replication set to next occur?**

1. Look at the right side of the **Replicator page**.
2. The next scheduled replication time is displayed.



Figure 157: Top right of Replicator page showing next replication time - as set by your administrator.

## **15.4 USING FAVORITE BOOKMARKS**

Favorite bookmarks are a way of listing and going to your most commonly used databases and pages.

### **i Adding items to your Favorite Bookmarks list**

There are several ways of creating **Favorite Bookmarks**. Each item to be added to Favorite Bookmarks must be able to be displayed as a **window tab**.

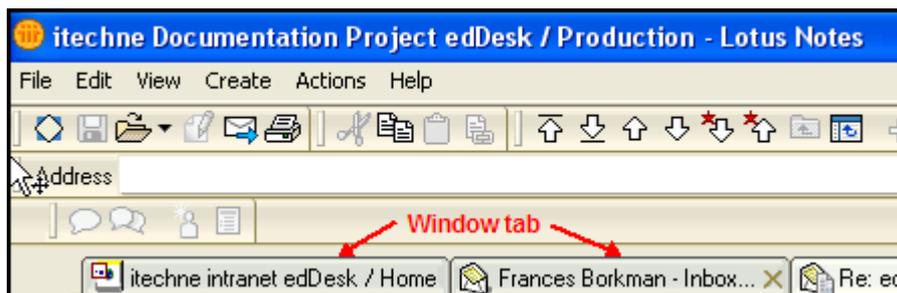


Figure 158: Window tabs. These can be added to the Favorite Bookmarks list.

### **Right-click on the article**

1. Display the article or screen you want to add to your **Favorite Bookmarks**.
2. Right-click on the item.
3. Select *Create Bookmark*.

**Drag a window to the Bookmark bar**

1. Display the article or screen you want to add to your **Favorite Bookmarks**.
2. Hold down the left mouse button and drag the window tab to the Favorite Bookmarks icon . The title bar is greyed out and the mouse appears as the “no permission” sign, as in the diagram below.



Figure 159: Dragging the titlebar with the "no permission" cursor indicating that the titlebar cannot be placed where it now is.

3. When you reach the **Favorites** icon your **Favorites list** appears.
4. Move your window tab to the position you want it to be listed at. A horizontal line shows you where it will be placed.

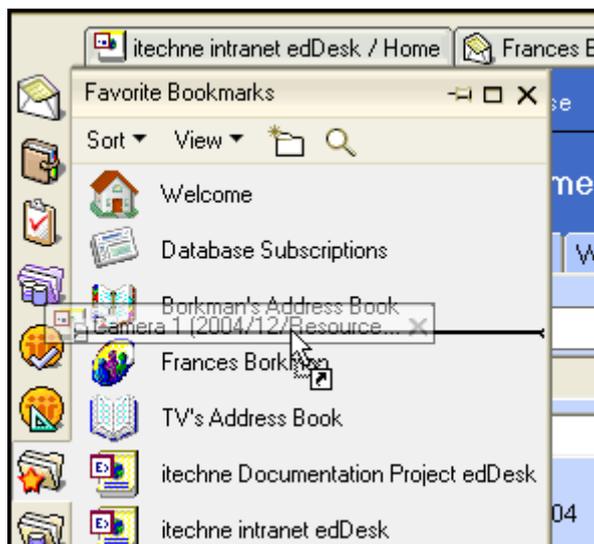


Figure 160: Titlebar and horizontal line showing where it will be placed in the Favorite Bookmarks list.

5. Release the mouse button. Your item is now in the **Favorite Bookmarks** list.

## ii Creating a bookmark Folder

1. Open the **Favorite Bookmarks** list.
2. Click the **New Folder** icon at the top of the Favorite Bookmarks list.

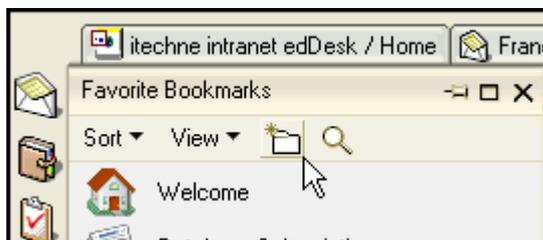


Figure 161: Mouse pointing to New Folder icon.

3. Folder name: Type a name for your new folder.
4. Click on the **Folder** that you want to put your new folder in.



Figure 162: New folder called "News items" to be put into the Favorite Bookmarks folder.

5. Click on <OK>.

## iii Removing an item from the Favorite Bookmarks list

1. Right click on the item to be removed.
2. Select *Remove Bookmark* or *Remove Folder*.

### Note

When you Remove Folder you also remove all bookmarks in that folder.

## 15.5 UPDATING AN INDEX

Search engines use indexes to help articles be quickly located and listed on your screen. edDesk uses **full text indexes** because they allow more accurate searching of the articles in your databases.

If you work on your organisation's server (on a network) the indexes are up-to-date. If you work on your own local version of Lotus Notes, indexing is done as a "background task" whenever your computer is not too busy – if it's always busy the indexing may not be done as frequently as you need.

If you have database permission you can manually update indexes.

### i Does my database use a full-text index?

To see if your database uses a full-text index do the following:

1. Go to a View that displays the Search bar. (**All Issues** and **Sections** views display the search bar).



Figure 163: Search bar. This example is from the "All Issues" view, but other views also have the Search bar.

2. Look at the top right of the **Search bar**. You see the word Indexed with either:
  - i. a green circle – full text indexed
  - ii. a brown circle – not full text indexed.

### ii When was my index last updated?

1. Go to a view that displays the **Search bar**.
2. Click on *<More>*.
3. Your **Search bar** is expanded. The right side of the search bar is below:

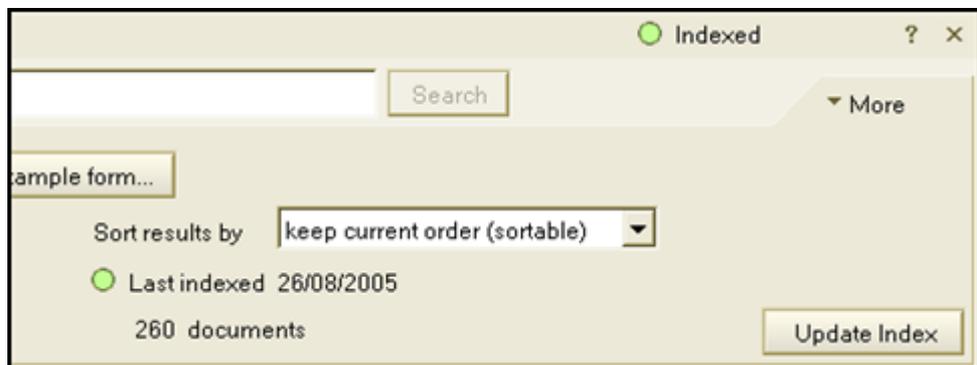


Figure 164: Search bar with indexing details shown.

4. You can see the date your database was last indexed and how many documents were included in your index.

### iii **Updating an index**

If you notice that the index has not been updated recently and you know that there have been several changes made to the articles in the database you can update the index.

The diagram above shows the database was last indexed on 26/08/2005. The screen capture was taken on 30/08/2005. Therefore the index has not been updated for four days – this database is also a training database, not a “real live” database, and does not have many articles added or edited.

To update the index:

1. Go to a view that displays the Search bar.
2. Click on *<More>*.
3. Your Search bar is expanded.
4. Click on *<Update Index>*.