Chapter 1

Logging In and Opening Lotus Notes Procedures

This chapter provides information about using the Lotus Notes Procedures Database at the American Cancer Society's National Cancer Information Center. Procedures is housed in the Lotus Notes Workspace, a part of the software in which companies can construct databases pertinent to their line of work and day-to-day processes.

Chapter One discusses the following topics:

- Logging in and Looking Around

- Navigating the Lotus Notes Workspace

- Selecting the NCIC Procedures Database
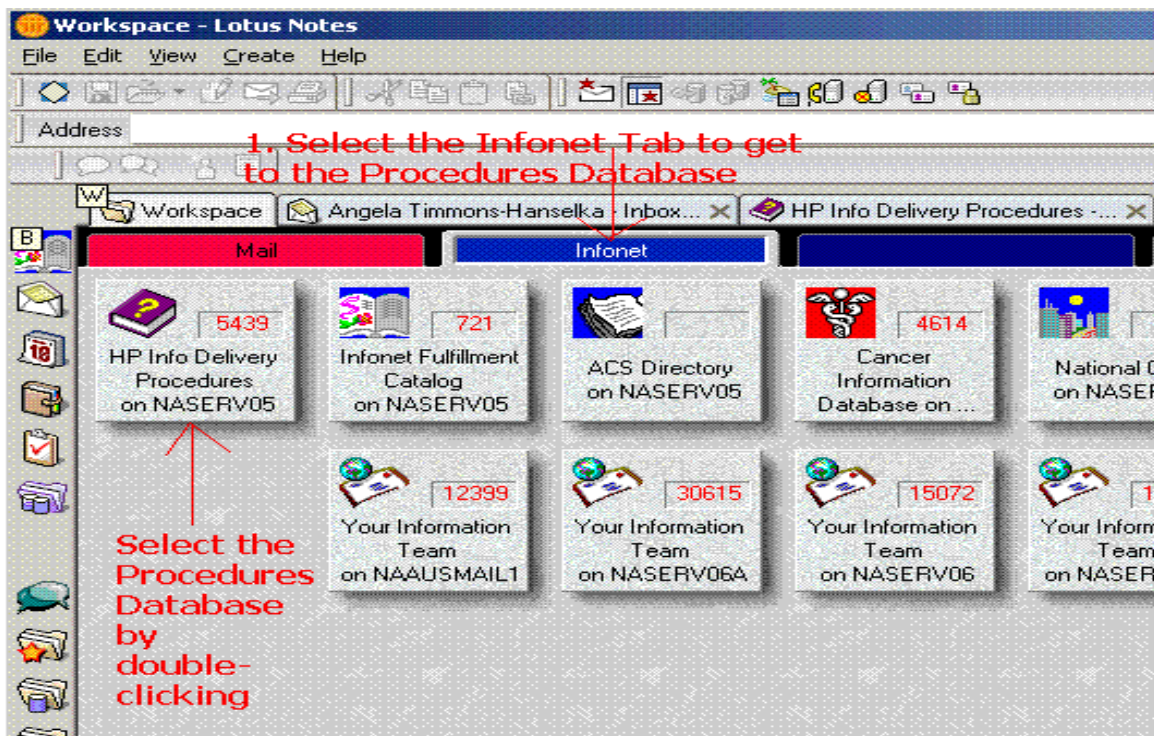
Logging in and Looking Around

1. Check with your trainer or immediate supervisor to obtain your Lotus Notes user-name; your username is an assigned variant of your first name.
2. Click the Lotus Notes icon on your desktop to launch the program.
3. Once Lotus Notes opens, the Lotus Notes *workspace* opens by default. The work-space houses your Lotus Notes mailboxes and databases. At the National Cancer Information Center, when you open Lotus Notes, a workspace tab titled "Infonet" automatically opens - this is where the procedures database, as well as other data-bases used by staff, are found.

Navigating the Lotus Notes Workspace

1. Click on Infonet to display the various databases used by NCIC staff.
2. Once you select the Infonet tab, you will see a series of buttons; the first button, "HP Info Delivery Procedures" is where you'll find NCIC's procedure database.
3. You will also see a Fulfillment Catalog that features ACS products, a Cancer Informa-tion Database and other buttons pertinent to your job function or special projects on which you work. Most departments at NCIC have their own buttons in the workspace; members of those departments are usually the only staff permitted to view the con-tent within those buttons. Click on the buttons specific to your job function or special project to familiarize yourself with the information within these databases.

Selecting the NCIC Procedures Database

1. Hover over the button that reads "HP Info Delivery Procedures."
2. Double-click the button to open the procedures database (see image below).

Using the Procedures Database

This chapter helps you, the NCIC staff, use the Procedures Database in Lotus Notes. The database contains hundreds of procedures housed in various "views," which are differentiated by the department for which they were created and accessible only to members of those departments and members of leaderhip. Within each view, employees will find procedures pertinent to their particular job function.

Chapter Two discusses the following topics:

- Finding Your "View"

- Using Search Terms to Locate Procedures

- Selecting the Appropriate Procedure

Finding Your "View"

Once you have opened the procedures Database (See Chapter One - Selecting the NCIC Procedures Database for information on this), you will be presented with a random list of procedures, a search bar, and different topic listings to the right side of the screen. These topic listings are actually "view" selections, characterized by the department for which each view is designated; for example, Cancer Information Specialists choose the top "view" that says "CIS."

Once you have selected the appropriate view (CIS, Donations, Health Insurance Assistance Team, Clinical Trials, etc.), a new list of procedure titles will appear. Above this list is a search bar — become acquainted with this feature of the database, as it is what you will use almost exclusively to search for and find procedures.

Using Search Terms to Locate Procedures

Using search terms, or *keywords*, to locate the procedure(s) you need to perform a job function will become second nature to you at NCIC. Keywords are terms you use to search for an item you need; for us, keywords help us find procedures.

1. Use your mouse to navigate your computer's cursor to the search bar and click within the bar itself. Consider a job function for which you would like to find some information, such as processing donations for constituents.
2. Type "`donations`" in the search bar and hit Enter.
3. A list of perhaps two dozen procedures related to donations will appear; scroll down to find one titled "Making a Donation to the American Cancer Society" as this is the donation you would need to process a donation. You will use this technique to find procedures related to all constituent-related job functions, as well as to find procedures related to Absences, Pay Periods, and Paid Time and other staff-related needs in the "Facilities" view.

Selecting the Appropriate Procedure

1. Double-click on the procedure "Making a Donation to the American Cancer Society."

2. The procedure will open, filling the window in workspace that was previously occupied by the list of procedures.

Navigating Within a Procedure

This chapter helps NCIC staff find specific pieces of information within a procedure. This, like finding the procedure itself, often involves use of a keyword or search term; however, you will use a short sequence of keystrokes to find information within a procedure. This trick comes in handy when you're navigating a particularly lengthy procedure.

Chapter Three discusses the following topics:

- Finding Specific Content Using Keystrokes

- Finding Information in a Twistie

- Provide Feedback on a Procedure

Finding Specific Content Using Keystrokes

Once you have opened a procedure (See Chapter Two for information to do this), you

will often be confronted with a lengthy document detailing any number of job functions.

Typically, you only need to view small parts of that document to perform a specific function. To do this, we use a simple keystroke called Ctrl+F.

1. Press the Ctrl Key and hold it down.
2. While still holding down the Ctrl key, hit the F button.
3. A dialogue box will appear that says "Find" and offers a search bar.
4. In the search bar, type a term for which you would like to find pertinent information within a procedure. To practice, use the procedure "Making a Donation to the American Cancer Society" and use the Ctrl+F function to search for the word "check" in order to find information for consituents who would like to send donations by check.
5. Lotus Notes will skip down the document until it finds the first use of the word "check" and will highlight the word. In this particular document, that is all you need to find the section about donations by check.

In some documents, you may need to hit "next" in the Find dialogue box to skip down the document until you find the section you need.

Finding Information in a Twistie

Lotus Notes allows the authors of procedures to insert compressed sections into "*twisties*." Authors can use twisties to compress sections of a document that are lengthy enough to become cumbersome to the reader, and therefore, potentially make the document difficult to read or navigate. Twisties are easily recognizable by a small arrow followed by text, usually in a bold typeface. By clicking a twistie, you open it and reveal its contents. Using the Ctrl+F function described in the previous section will also open all of a document's twisties. Unfortunately, the Lotus Notes software currently does not perform a search of twistie titles when users use Ctrl+F to find specific content within a document; however, the Ctrl+F function will search the text within a twistie. This unfortunate aspect of using Ctrl+F typically does not hinder a user's ability to find correct content.

Providing Feedback on a Procedure

Sometimes, you will use a procedure that you may find difficult to read. Perhaps you were unable to find the section you needed using Ctrl+F because the word you were using to perform the search was not in a twistie title, therefore making you miss the twistie section that included the directions you needed to perform a job function. In

these cases, each procedure has a button in the top right corner that says "Questions/Comments." Clicking this button will bring up a dialogue box in which you can type questions or suggestions to improve the procedure. When you hit "Enter" to send the Q/C, your feedback is sent directly to the center's Information Team for investigation and action.