BOWNE
JFS Litigator's
Notebook®

JFS
Design Kit

Bowne

JFS Design Kit™

User's Guide

Release 7.5
R1DKUG75001

Contents

Contents

CHAPTER 1   *Introduction*

What Is Design Kit?

JFS Design Kit™ is a program that enables you to create custom databases in *JFS Litigator's Notebook®*. You can create a database by using a standard *Notebook*, *Indexer, Pleadings, Transcript,* or *Correspondence Module* template or database. You can also customize existing *Notebook*, *Indexer, Pleadings, Transcript,* or *Correspondence Module* databases.

NOTE: *Design Kit 7.5 may only be used with JFS Litigator's Notebook 7.5 databases and templates.*

Design Kit allows you to:

- Add or remove binders from a *Notebook*.
- Add, change or remove views from a database.
- Rename and remove forms from a database.
- Add fields to forms in a database.

Design Kit features an easy-to-use workspace in a Windows® Explorer-style format:
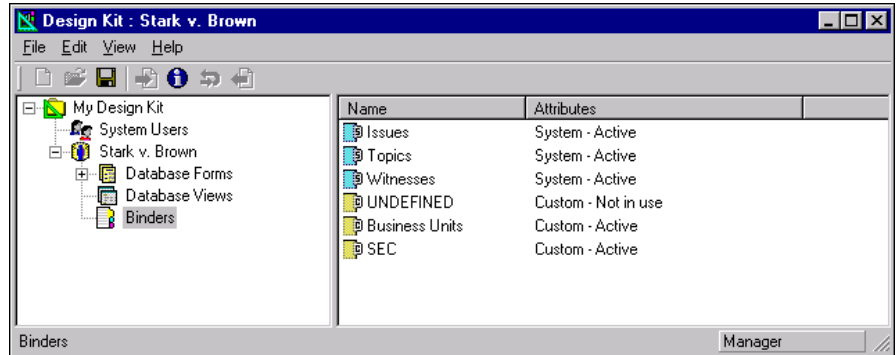
JFS Litigator's Notebook

JFS Litigator's Notebook is made up of five main *Lotus Notes*® databases:

- *Notebook*
- *Indexer Module*
- *Pleadings Module*
- *Transcript Module*
- *Correspondence Module*

Design Kit allows the creation of custom *Notebook* and *Indexer* Module databases and the modification of existing *Notebook* and *Indexer* Module databases. In addition, version 7.5 of *Design Kit* now allows you to create and modify *Pleadings, Transcript* and *Correspondence* databases.

NOTE: *Throughout the* Design Kit *User's Guide, the words* database *and* module *are used interchangeably.* Module *is the name used to describe the Lotus Notes databases that make up* JFS Litigator's Notebook.

The *Notebook* organizes all information pertinent to a case. Documents can be created within the *Notebook* or copied from the bulk repository databases (*Pleadings Module, Transcript Module, Indexer Module*) into binders and lists.

The *Indexer Module* is a bulk repository for discovery documents. This database is used to search for key case documents. Once these documents are retrieved, they are copied to the *Notebook,* where they are organized into binders and document lists.

The *Transcript Module* is a bulk repository for transcripts, such as depositions and court proceedings. The transcript text is loaded from the text file created by the court reporter. Once the transcript is loaded, the text can be searched for key information. Then the key passages can be digested and/or filed in the *Notebook.*

The *Pleadings Module* is a repository module for storing documents issued by or filed with the court. Pleadings may include briefs, motions, orders, interrogatories, or any other type of pleading.

The *Correspondence Module* is a repository for storing attorney and paralegal correspondence pertinent to a case, such as memos and e-mails. This module is a new feature of *Design Kit.*

As mentioned previously, you can use *Design Kit* to customize the *Notebook*, *Indexer, Pleadings, Transcript,* and *Correspondence Module* databases. You can create special binders that organize information according to particular case needs, customize a view to display documents according to custom criteria, etc. The following section will describe various database components and how they may be customized.

CHAPTER 2   *Getting Started*

Setup and Installation

Use the *JFS Design Kit* setup program to install the product for the first time. However, before running the installation, keep in mind the following considerations:

- Lotus Notes® 5.0.5 (both server and client) must be installed. This release of *Design Kit* is not compatible with any earlier versions of Notes.

- Lotus Notes must be installed, but not running, on the client workstation. It is best to close Notes, install *Design Kit*, and then restart Notes.

- The installation setup requires 32-bit Windows platforms.

- If Notes or Windows is run from a directory on a shared drive, determine the drive letter and mapping. If either Notes or Windows is run from a network directory, you must have security rights to write to that directory.

- You must have both *JFS Litigator's Notebook*® Release 7.5 server and client installed.

Minimum Recommended System Configuration

The following are system configuration recommendations for *JFS Design Kit*. The sample configuration below assumes that a network compatible with Lotus Notes is in place. Lotus Notes 5.0.5 is required for this version of *Design Kit*.

Server:

- Lotus Domino® Server 5.0.5 or higher
- Pentium® processor
- 128 MB RAM
- 1.2 GB SCSI hard disk (or more)
- Windows NT 4.0, Service Pack 5 or higher
- Disk duplexing and/or tape backup
- 32-bit NIC
- UPS
- 28.8 (or faster) modem

Workstation:

- Windows 95, Windows 98, Windows 2000 or Windows NT 4.0 Service Pack 5 or higher
- Lotus Notes 5.0.5 or higher
- Pentium processor
- 32 MB RAM (128 MB RAM for Windows 2000)
- 1.2 GB hard disk
- SVGA monitor
- Network interface card

You will install the *Design Kit* software on a local workstation. It may be an individual PC, laptop, or shared network drive. *Design Kit* must be installed in the same directory as your Lotus Notes client software.

The *Design Kit* setup program needs to know the path to your Notes application directory. If you do not know the path, go to Windows, select the Notes icon and Properties, find and make note of the path to Notes.exe.

Installation

1. Insert the CD-ROM into the CD-ROM drive. Navigate to that drive in Windows Explorer, and double-click on it. This will reveal the various install directories.

2. Double-click on **setup.exe**. The following screen appears.
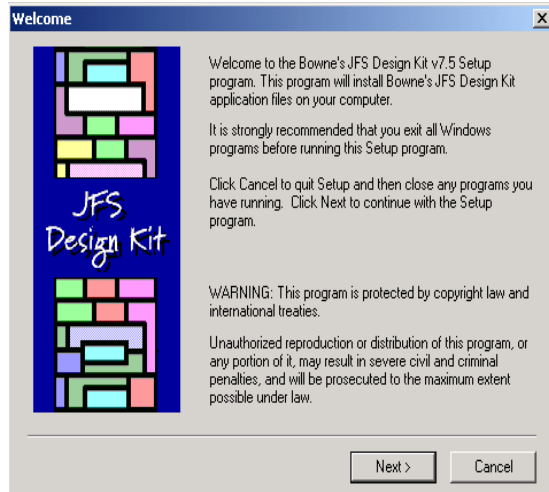
3. Select **Next**. The following screen appears:

4. Enter the path to the directory containing the Lotus Notes server application. Select **Next**. The installation process will begin.

5. A message will appear confirming that you have successfully installed *Design Kit*. Select **OK**.

Administration

Once you have installed *Design Kit*, you will be required to establish security access by designating a *Design Kit* Manager. The manager will be responsible for assigning design privileges to all *Design Kit* users.

NOTE: *If there will be multiple users making Design Kit modifications, ensure that you are using the Registration Database on your Notes server. Also, before using Design Kit, ensure that Notes is also in use.*

1. Launch *Design Kit*. The following message appears.
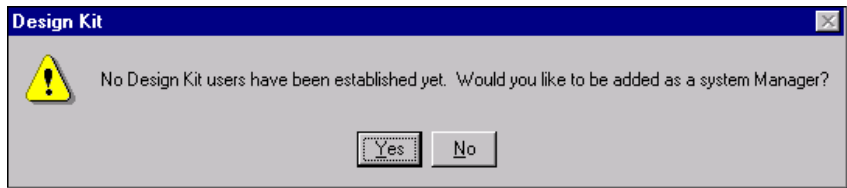
NOTE: *This message only appears when Design Kit is first launched after it is installed.*

2. Select **Yes** if you will be designating yourself as manager. *Design Kit* will open.
OR
Select **No** if you wish to designate a different administrator as manager. If you select **No**, the following message appears.
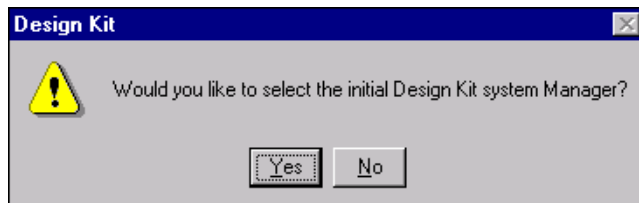
3. Select **Yes**. The following screen appears.
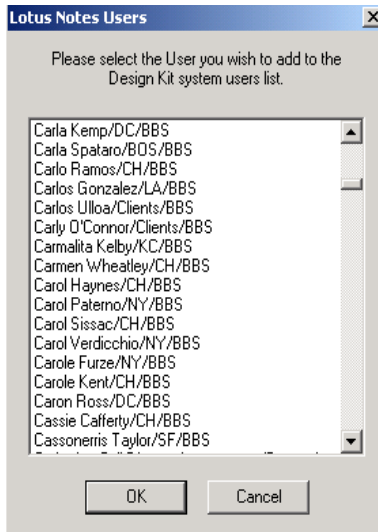
4. Select the desired name from the Lotus Notes Users list. This user will be designated as the *Design Kit* Manager.

5. Select **OK**. *Design Kit* is now ready for use.

Design Kit Security

The first task to perform after installing *Design Kit* is to define design privileges for any additional *Design Kit* users. The *Design Kit* Manager (designated in the previous section) is responsible for determining who can use *Design Kit*, and what level of access they can have in the *Design Kit* program.

NOTE: *Design Kit security only determines who can use Design Kit. It does not alter or overwrite Lotus Notes security.*

NOTE: *You must have a license for each Design Kit user. Contact Bowne JFS for more information.*

There are three levels of *Design Kit* access:

Basic Designer

The Basic Designer can only create *Notebook*, *Indexer, Pleadings, Transcript* and *Correspondence Module* databases by using a template or existing database. A Basic Designer cannot modify any databases.

Advanced Designer

The Advanced Designer has basic designer functions plus the ability to add new binders and modify databases. Advanced Designers can make any type of database modification.

Manager

The Manager role includes all basic and advanced designer functions as well as the ability to change *Design Kit* security. The Manager can add new *Design Kit* users and assign design privileges.

Adding New Designers

1. In the *Design Kit* workspace, select the plus sign (+) to the left of **My Design Kit** to display the program options.
2. Select **System Users** in the left workspace pane. Any current designers and their access levels will be displayed in the right workspace pane.
3. Select **Edit: Add** from the menu bar. The **User Properties** dialog box will be displayed.
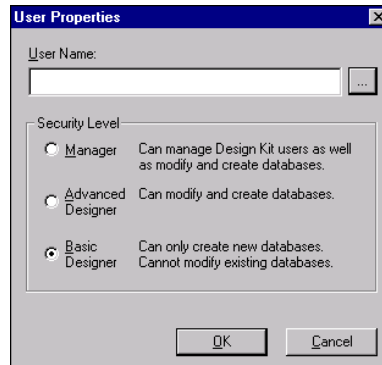
4. Select the new designer's name:

   - Select the **Browse** (**...**) button to the right of the **User Name** field and select the designer's name from the list of available users,
     or

   - Type the new designer's name in the **User Name** field exactly as it appears in the server's Name and Address Book.

5. Select the **Manager**, **Advanced Designer** or **Basic Designer** radio button to determine the new user's design privileges.

6. Select **OK**. The new designer will be listed in the right workspace pane.

Editing Design Privileges

1. In the *Design Kit* workspace, select **System Users** from the left workspace pane. All current designers and their access levels will be displayed in the right workspace pane.

2. Highlight the designer's name you wish to edit.

3. Select **Edit: Properties** from the menu bar. The **User Properties** dialog box will be displayed.

4. Select the **Manager**, **Advanced Designer** or **Basic Designer** radio button to change design privileges.

5. Select **OK**.

Deleting Design Privileges

1. In the *Design Kit* workspace, select **System Users** from the left workspace pane. All current designers and their access levels will be displayed in the right workspace pane.

2. Highlight the designer's name you wish to delete.

3. Select **Edit: Delete** from the menu bar. The user's name will be deleted from the list of designers.

CHAPTER 3 *Managing Databases*

In *Design Kit,* you can create a new *Notebook* database with an .NSF extension that can then be opened in Lotus Notes like any other *Notebook* database. Once a new database is created, you can customize it according to your needs by adding, editing and removing binders, views and user-defined fields. You can also edit and remove forms.

This chapter describes how to create and modify a basic database. Following chapters describe how to create, modify and remove the various database elements mentioned previously. You must open *Design Kit* to accomplish all of these tasks.

JFS recommends that:

- All new and modified *Design Kit* databases should be created and changed locally. Once your new/modified databases are ready, they can be replicated to the network and used like any other database. You should make any changes to the custom databases locally using *Design Kit.* Once you've made those changes, replicate the changes to the network.

- It is important to think about the implications of modifying existing databases before you make changes. When you customize a database, choose the one that most closely resembles the database you are trying to create so that fewer design modifications will have to be made.

Database Components

The database elements you can customize using *Design Kit* are as follows:

Binders

Binders are the basis for categorizations in *JFS Litigator's Notebook*. Binders provide convenient storage and organization for case information, just like conventional three-ring binders.

The *Notebook* provides three standard binders: **Issue** binder, **Topic** binder, and **Witness** binder. Using *Design Kit*, you can add up to three additional **Custom** binders to a *Notebook*.

Forms

Forms are basically a collection of blank fields in which you enter data, then save to create a document. Examples of *Notebook* forms include **Memos**, **Comments**, and **Document Synopses**.

Although you cannot create new forms using *Design Kit*, you can customize forms by adding new fields.

Fields

Fields are the slots within a form where data is entered. There are four kinds of fields you can add to a form using *Design Kit*: **Text** fields, **Date** fields, **Rich Text** fields, and **Number** fields. All fields except the Rich Text field can also be designated as multi-value fields.

Views

Views are different ways of looking at a database. You can choose a particular view to help you find information more quickly--for example, the view **Documents: By Author** would show you a list of discovery documents sorted according to who authored them.

A view is made up of columns. These columns allow you to determine the sort order of the view and the data that appears in each column. Using *Design Kit*, you can add views and modify most views by adding or deleting columns and customizing column properties.

Creating a New Database

You have two options when creating your new database:

You can use a *Notebook*, *Indexer, Pleadings, Transcript,* or *Correspondence Module* template (7.5)

or

You can use an existing case *Notebook*, *Indexer, Pleadings, Transcript,* or *Correspondence Module* database. This option may be desirable if you have already created a modified *Module* design and now want to create a new database using the same or a similar design.

1. In the *Design Kit* workspace, select **File: New** from the menu or **Ctrl-N** from the keyboard. The **Select Database: Template to Copy** dialog box appears.
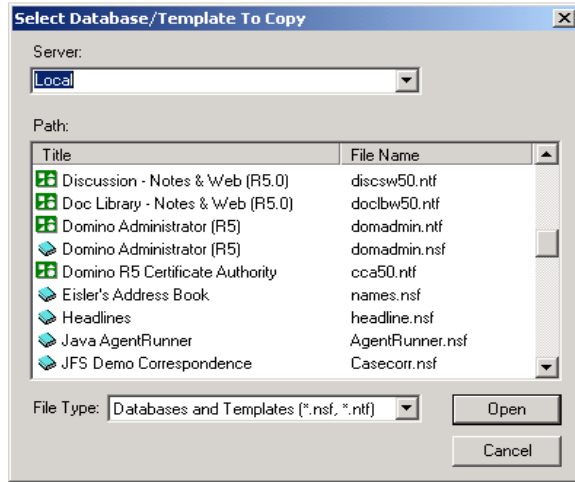
2. Select the server where the database or template you wish to use resides.

3. Select the path and file for the database or template you wish to use to create your new database.

4. Select **Open**. The **New Database** dialog box appears.
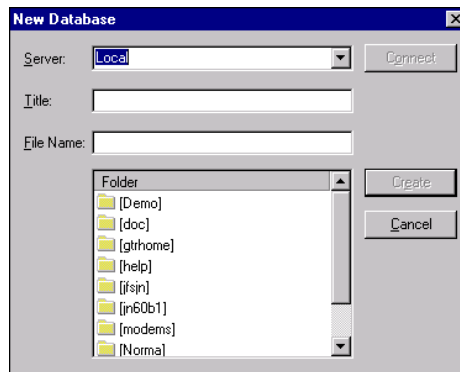
5. Select the server for your new database.

6. Enter the title and file name of your new database.

NOTE: *If necessary, select a directory path or the new database will be created at the root level. You can also type in a directory path name in the File Name field and the directory will be automatically created.*

7. Click **OK**. Your new database will be opened in the *Design Kit* workspace.

Modifying a Database

Once you have created a new database in *Design Kit*, you can modify it at any time to fit a particular case. You can also modify any existing *Notebook, Indexer, Pleadings, Transcript,* or *Correspondence Module* database.

NOTE: *Design Kit 7.5 may only be used to modify databases created using JFS Litigator's Notebook 7.5. For information on using other versions of Design Kit and Litigator's Notebook, please contact Bowne JFS Customer Support.*

1. In the *Design Kit* workspace, select **File: Open** from the menu bar or **Ctrl-O** from the keyboard. The **Open Database: Template** dialog box appears.
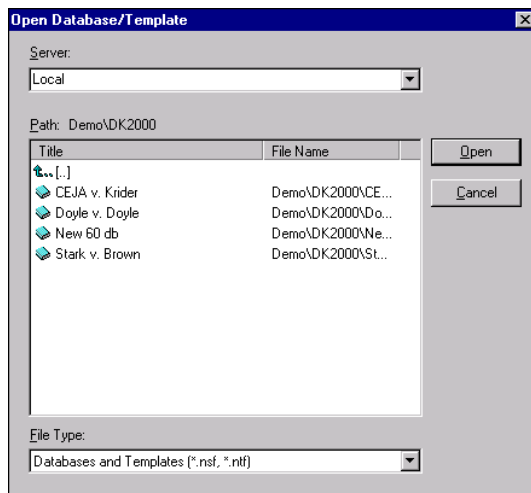
2. Select the server where the database you wish to edit resides.

3. Select the path and file for the database.

4. Select **Open.** The selected database will be opened in *Design Kit* and its name displayed in the left workspace pane.

5. Select the plus sign (+) to the left of the database name to display the modification options for the database in the right workspace pane.

6. At this point you may select and edit database elements as needed. See the following chapters in this manual for information on how to work with binders, forms, fields and views.

Renaming A Database

This function allows you to rename the database title.

1. Ensure the database name is highlighted in the left workspace pane.

2. Select **Edit: Rename** from the menu bar or **Ctrl-R** from the keyboard. The **Database Properties** dialog box appears.
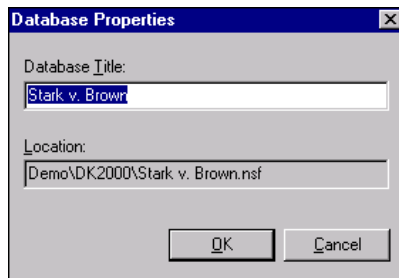
3. Edit the database title as desired.

4. Select **OK.**

CHAPTER 4   *Managing Binders*

Binders are the basis for categorizations in *JFS Litigator's Notebook*. Binders provide convenient storage and organization for case information, just like conventional three-ring binders. The *Notebook* provides the following three standard binders:

- **Witness** binder (potential witnesses)
- **Issue** binder (key issues)
- **Topic** binder (key fact areas)

By using *JFS Design Kit 7.5*, you can add up to three additional **Custom** binders to a *Notebook*.

Custom binders organize case information around customized criteria. Examples of custom binders might be **Products, Test Methods** and **Patents.** You can create custom binders in a new *Notebook* database, or add custom binders to an existing *Notebook*.

Creating a New Binder

1. Select the plus symbol (**+**) to the left of the database title. The various database elements (**Database Forms, Database Views**, **Binders**) will be displayed underneath the database title in the left workspace pane.

2. Select the **Binders** icon in the right workspace pane. The binder selections will be displayed in the right workspace pane.

3. Double-click one of the binder icons in the right workspace pane. The **Binder Properties** dialog box appears.
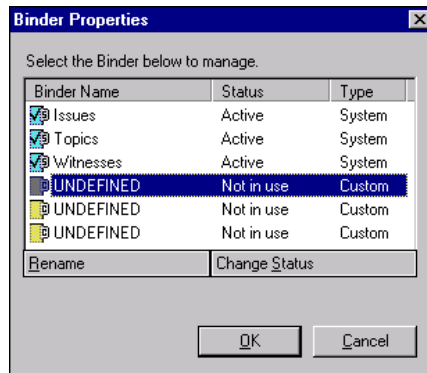
4. Select the first **Undefined** binder icon.

5. Select the **Rename** button. The binder name will become available for editing.

6. Type the name for the new binder and press the **Enter** key.

NOTE: *Binder names are limited to 50 characters.*

---

7. Make sure the new binder name is still highlighted, then select the **Change Status** button. The new binder will be activated.

8. Select **OK**.

Once you have created your new binder, open the *Notebook* database, select the binder, click **New Binder** button and create a **Binder Profile**. For more information on binder profiles, refer to your *JFS Litigator's Notebook* documentation.

Modifying a Binder

In *Design Kit*, you can choose which binders will be used in a particular *Notebook* database by "activating" and "deactivating" them. This includes the JFS "standard" binders (**Witness**, **Topic**, and **Issue**) as well as the **Custom** binders you can create. You can also rename any **Custom** binders you are using.

NOTE: *Although you can choose to not include a standard binder in a Notebook, you cannot modify standard binder names.*

Removing a Binder

1. Select the plus symbol (**+**) to the left of the database title. The various database elements (**Database Forms, Database Views**, **Binders**) will be displayed underneath the database title in the left workspace pane.

2. Select the **Binders** icon in the left workspace pane. The binder selections will be displayed in the right workspace pane.

3. Double-click a binder icon in the right workspace pane, or select the icon and enter **Ctrl-P** from the keyboard. The **Binder Properties** dialog box appears.

4. Select the binder you wish to remove from the database.

NOTE: *Binders currently in use will be displayed in "Active" status.*

Binder Properties

Select the Binder below to manage.

Binder Name	Status	Type
Issues	Active	System
Topics	Active	System
Witnesses	Active	System
Business Units	Active	Custom
SEC	Active	Custom
UNDEFINED	Not in use	Custom

Rename	Change Status

OK   Cancel
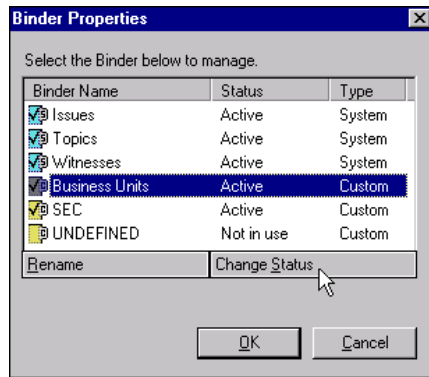
5. Select the **Change Status** button. A message will appear asking you to confirm binder status.

6. Select **Yes**. The binder status will be changed to "Not In Use."

7. Select **OK**.

Renaming a Binder

You can only rename custom binders.

1. Select the plus symbol (**+**) to the left of the database title. The various database elements (**Database Forms, Database Views**, **Binders**) will be displayed underneath the database title in the left workspace pane.

2. Select the **Binders** icon in the left workspace pane. The binder selections will be displayed in the right workspace pane.

3. Double-click a binder icon in the right workspace pane. The **Binder Properties** dialog box appears.
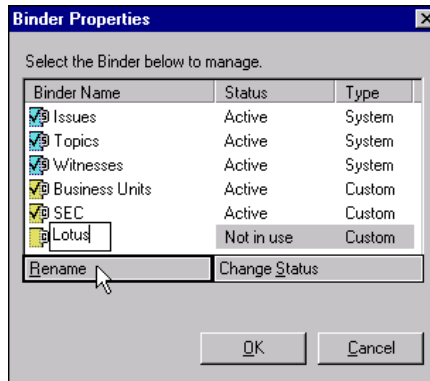
4. Select the **Rename** button. The binder you wish to rename will become available for editing.

5. Type the name for the new binder and press the **Enter** key.

NOTE: *Binder names are limited to 50 characters.*

6. Select **OK**.

CHAPTER 5 *Managing Forms*

Forms are a collection of blank fields in which you enter data, then save to create a document. Although you cannot create new forms using *JFS Design Kit*, you can customize forms by adding new fields.

Most forms can be renamed, deleted and restored. Restricted forms are indicated in the **Attributes** column in the right workspace pane for **Database Forms** (for a list of forms, refer to Appendix A).

You can also add, modify and delete custom fields in a form. With *Design Kit 7.5*, this means you can also customize images that appear on the forms.

For information on custom fields, see Chapter 6 of this manual.

Renaming a Form

This will change the name that appears in the **Create** menu.

1. Select the plus symbol (**+**) to the left of the database title. The various database elements (**Database Forms, Database Views**, **Binders**) will be displayed underneath the database title in the left workspace pane.

2. Select the plus symbol (+) to the left of the **Database Forms** icon in the left work-space pane. The form selections will be displayed underneath the icon.

3. Select the form whose name you wish to change.

4. Select **Edit: Rename** from the menu bar or select **Ctrl-R** from the keyboard. The form name will become editable.

View Objects	Attributes
_Keywords	Restricted
Binders_One	
Binders_Two	
Binders\Topics	
Binders\Witnesses	
Calendar\By Assigned To	
Calendar\By Cal	Restricted
Calendar\By Date	
Calendar\By One	Custom
Calendar\To Do	

5. Edit the form name.

6. Select **OK**.

Deleting a Form

1. Select the plus symbol (**+**) to the left of the database title. The various database ele-ments (**Database Forms, Database Views**, **Binders**) will be displayed under-neath the database title in the left workspace pane.

2. Select the plus symbol (+) to the left of the **Database Forms** icon in the left work-space pane. The form selections will be displayed underneath the icon.

3. Select the form you wish to delete from the database.

4. Select **Edit: Delete** from the menu bar or **Ctrl-D** from the keyboard. A red mark will be placed on that form's icon, indicating that the form has been marked for deletion from the database.
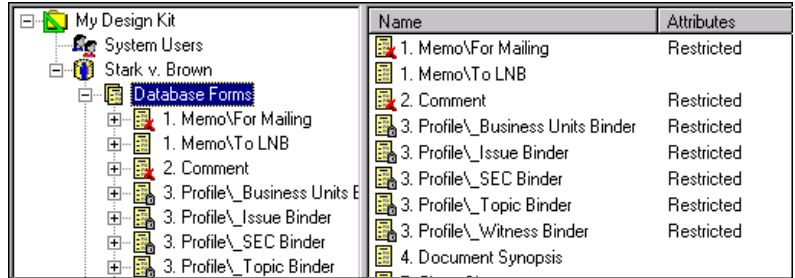
NOTE: *You should exercise caution when deleting forms.*

Restoring a Form

1. Select the plus symbol (**+**) to the left of the database title. The various database elements (**Database Forms, Database Views**, **Binders**) will be displayed underneath the database title in the left workspace pane.

2. Select the plus symbol (+) to the left of the **Database Forms** icon in the left workspace pane. The form selections will be displayed underneath the icon. Any deleted forms will be displayed with a red mark on the form icon.

3. Select the form you wish to restore to the database.

4. Select **Edit: Restore** from the menu bar or **Ctrl-E** from the keyboard. The form will be restored to the database.

Customizing Form Images

JFS *Design Kit 7.5* allows you to customize the preformatted images that appear on the *Notebook*, *Indexer, Pleadings, Transcript,* or *Correspondence Module* database forms.

1. Select the plus symbol (**+**) to the left of the database title. The various database elements (**Database Forms, Database Views**) will be displayed underneath the database title in the left workspace pane.

2. Select the plus symbol (**+**) to the left of the **Database Forms** icon in the left workspace pane. The form selections will be displayed underneath the icon.

3. Select the form you wish to change (e.g., **Document Synopsis**).

4. Select the form image icon you wish to change.

5. Right-click **Properties** with the mouse, select **Edit: Properties** from the menu, or select **Ctrl-P** from the keyboard. The **Image Properties** dialog box will appear.
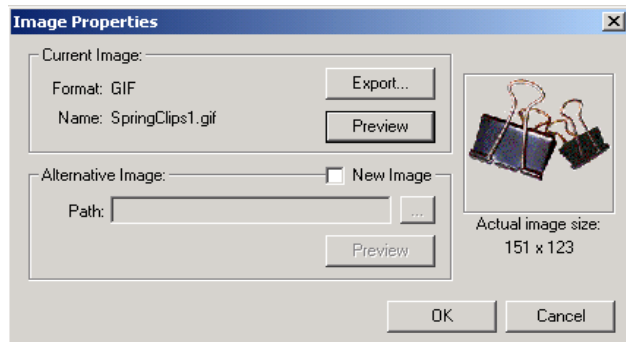
6. Click the **New Image** radio button. The **Path** field will turn white.

7. Type the file path to the image you want to substitute, or click the ellipsis (**...**) button to the right of the **Path** field to browse through your computer or network files to find the image you want to substitute.

NOTE: *You can select from images in GIF or JPEG format.*

8. Click the bottom **Preview** button to view the new image.

NOTE: *The top Preview button takes you back to the original image. The Export button allows you to send an image from its original location into another file path that you choose.*

9. Click **OK** to select the graphic. *Design Kit* will import the graphic to the *Litigator's Notebook*.

CHAPTER 6 *Managing Fields*

Fields are the slots within a form where data is entered. There are four kinds of fields you can add to a form using *Design Kit*: **Text** fields, **Date** fields, **Rich Text** fields, and **Number** fields. All fields except the **Rich Text** field can also be designated as a multi-value field.

Text Fields contain letters, punctuation, spaces and numbers. Most *Notebook* database fields are text fields; examples include **Authors**, **Document Type** and **Subject**. These fields can hold up to 15K of information.

Date Fields contain data in date format.

Rich Text Fields contain data in rich text format; in other words, you can add pictures, graphs, hot spots, attachments, embedded objects and doclinks in conjunction with text styles such as bold, italic, underlined, and different fonts or colors. The **Body** field is a good example of a *Notebook* rich text field.

Number Fields contain data in numeric form that can be computed mathematically.

Keyword Fields contain word choices that are unique for each firm and case. When populating these fields, only values that have been predefined by the *Litigator's Notebook* administrator may be selected.

Multi-Value Fields can have more than one value entered in each field. A comma or semicolon must separate each entry. For example, you could enter Rhodes - JB, Stark - AJ, Zimmerman - DS as three values in the **Authors** or **Copyees** field.

Creating a New Field

NOTE: *Before creating a new field, you must select the form and form section to which it will be added.*

1. Select the plus symbol (**+**) to the left of the database title. The various database elements (**Database Forms, Database Views**, **Binders**) will be displayed underneath the database title in the left workspace pane.

2. Select the plus symbol (+) to the left of the **Database Forms** icon in the left workspace pane. The form selections will be displayed underneath the icon.

3. Select the plus symbol (+) to the left of the form (**Memo\To LNB**, for example) in which you wish to create the new field. A list of form sections will be displayed underneath the form.
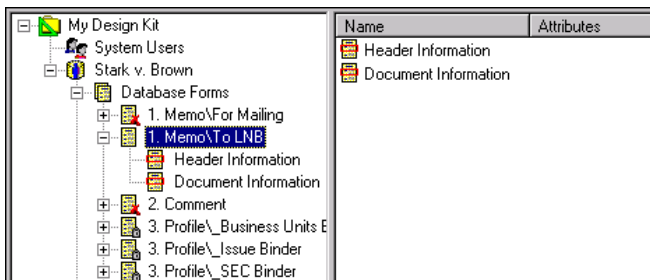
4. Select the form section (**Header Information**, for example) in which you wish to create the new field.

5. Select **Edit: Add** from the menu bar or **Ctrl-A** from the keyboard. The **Field Properties** dialog box appears.
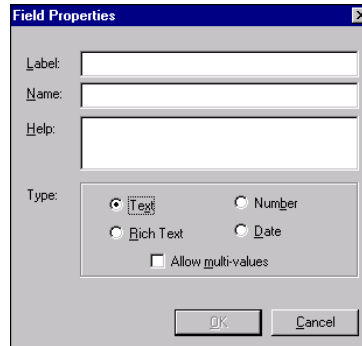
6. Enter the properties for the new field:

   • Type the field label in the **Label:** field. The label will be displayed on the form and should be descriptive of the field's contents.

NOTE: *The character limit for labels is 64.*

   • The **Name:** field will automatically be filled in from the **Label:** field, except it will not contain any spaces. This value is an internal field name and will not be displayed in the form.

NOTE: *The character limit for names is 32.*

   • Type a brief field description in the **Help:** field (optional). This text will display as field help when the cursor is in this field.

NOTE: *The character limit for field help is 64.*

   • Select the field type from the following radio buttons\check box:

      • **Text:** Most commonly used field in the *Notebook*. This type of field can be displayed in a view, and has a 15K limit.

      • **Number:** Numbers only.

      • **Date:** Dates only.

- **Allow multi-values**: May be used for every field except Rich Text.
- **Rich Text:** Good field type to use if the text in the field needs to be formatted or you need to populate the field with more than 15K of text, graphics, doclinks, etc.

7. Select the **OK** button. The new field will be displayed in the right workspace pane.

Keyword-Driven Fields

With *JFS Design Kit 7.5*, you can now create fields that use keywords in the *Notebook, Indexer, Pleadings, Transcript,* or *Correspondence Module* databases. Keyword fields allow users to select from apredetermined list which ehlep to ensure consistency in data for searching.

Bowne JFS recommends the user give the same name to the field label and the keyword.

Modifying a Field

You can modify only those custom fields which have been created using Design Kit.

NOTE: *Before modifying a field, you must select the form and form section where it is located.*

1. Select the plus symbol (**+**) to the left of the database title. The various database elements (**Database Forms, Database Views**, **Binders**) will be displayed underneath the database title in the left workspace pane.
2. Select the plus symbol (**+**) to the left of the **Database Forms** icon in the left workspace pane. The form selections will be displayed underneath the icon.

3. Select the plus symbol (+) to the left of the form (**Memo\To LNB**, for example) in which you wish to create the new field. A list of form sections available for editing will be displayed underneath the form.
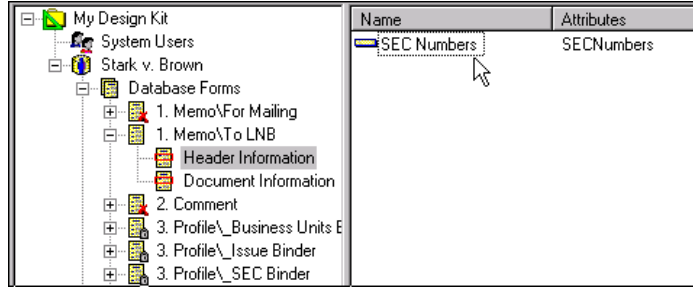
4. Select the form section (**Header Information**, for example) which contains the field you wish to edit. A list of editable fields will be displayed in the right workspace pane.
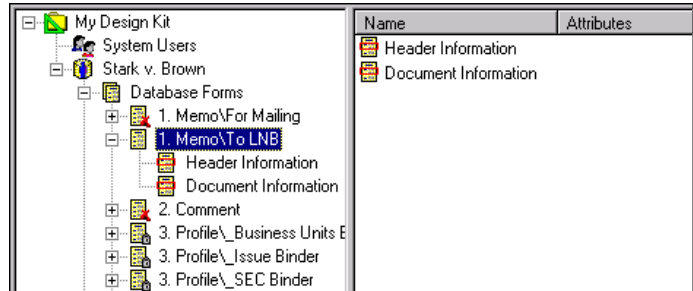
5. Double-click the custom field name in the right workspace pane that you wish to edit. The **Field Properties** dialog box appears.
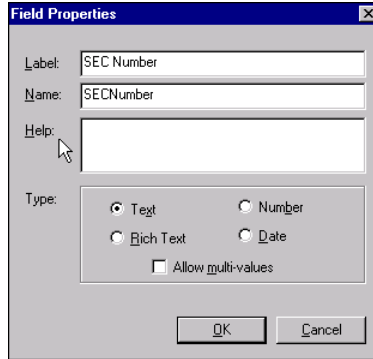
6. Use the dialog box to edit the various field properties.

7. Select **OK** once you are finished editing.

NOTE: *Use caution when editing the field name or type. Changes to the field name or type in fields that already contain data could affect views and forms where those fields are displayed.*

Deleting a Field

NOTE: *Use caution in performing this function. It cannot be undone.*

---

1. Select the plus symbol (**+**) to the left of the database title. The various database elements (**Database Forms, Database Views, Binders**) will be displayed underneath the database title in the left workspace pane.

2. Select the plus symbol (**+**) to the left of the **Database Forms** icon in the left workspace pane. The form selections will be displayed underneath the icon.

3. Select the plus symbol (**+**) to the left of the form (**Memo\To LNB**, for example) which contains the field you wish to delete. A list of form sections will be displayed underneath the form.

4. Select the form section which contains the field you wish to delete. A list of editable fields will be displayed in the right workspace pane.

5. Select the field name you wish to delete.

6. Select **Edit: Delete** from the menu bar, or **Ctrl-D** from the keyboard, or the **Delete** button.

7. Select **OK** once you are finished editing.

Managing Views

Views are different ways of looking at a database. You can choose a particular view to help you find information more quickly--for example, the view **Documents\By Author** would show you a list of discovery documents sorted according to who authored them. *Design Kit* allows you to delete almost any view in *Notebook*, *Indexer, Pleadings, Transcript,* or *Correspondence* Modules (refer to Appendix A for exceptions), rename an existing view, and edit the properties of most standard and all custom views.

A view is made up of columns. These columns allow you to determine the sort order of the view and the data that appears in each column. Using *Design Kit*, you can add views and modify most views by adding or deleting columns and customizing column properties. In addition, this version of *JFS Design Kit* allows you to create or modify pleadings, transcripts and correspondence in all *Notebook*, *Indexer, Pleadings, Transcript,* or *Correspondence Modules.*

However, certain columns contain JFS formulas. These columns may be modified or deleted, but the JFS formula cannot be recreated.

Each view also contains a selection formula that determines what forms the view displays. For example, the **Memos** views will display only memos that have been created using the *Notebook*. A **Document Synopsis** or **Transcript** will not appear in this view. The **Binders** views, on the other hand, will display most every form available in the *Notebook*, since binders contain information which appears in many different kinds of forms.

You will notice that when you open the **View Properties** dialog box, selecting the **Advanced** button allows you to view the selection formula for that view. It does not need to be modified. For more information about selection formulas, consult your Lotus Notes Developer's Guide.

The most common view modifications are renaming the view and modifying view columns. Both these subjects are discussed in the following sections.

Creating a New View

In *Design Kit,* a new view is created by using an existing view as a template, then customizing it to your specifications. It is best to select the view that most closely resembles the new view you want to create; there will be fewer, simpler modifications required.

1. Select the plus symbol (**+**) to the left of the database title. The various database elements (**Database Views, Database Forms**, **Binders**) will be displayed underneath the database title in the left workspace pane.

2. Select the **Database Views** icon in the left workspace pane. The view selections will be displayed in the right workspace pane.

3. Select the view (**Memos\By Author**, for example) you wish to use as a template for the new view.

4. Select **Edit: Add** from the menu bar or **Ctrl-A** from the keyboard. The **New View Name** dialog box appears.
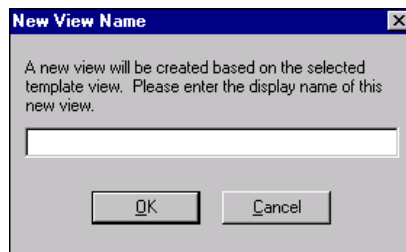
5. Enter the name for the new view.

NOTE: *If you are creating a cascading view (such as Memos\By Recipient) be sure to include the backslash symbol (\ ). This will also ensure the view is grouped with its related views, such as Memos\By Author, Memos\By Date, etc.*

6. Select **OK**. The new view name will appear in the view selection list. For information on modifying view elements, see the following chapter section "Modifying A View."

Modifying a View

Using *Design Kit*, custom views and most standard *Notebook*, *Indexer, Pleadings, Transcript,* or *Correspondence* views can be modified. Some system-defined views are not available for editing (refer to Appendix A). Restricted views are indicated in the **Attributes** column in the right workspace pane for **Database Views**.

Modifying a Selection Formula

Each view also contains a selection formula that determines what forms the view displays. For example, the **Memos** views will display only memos that have been created using the *Notebook*. A **Document Synopsis** or **Transcript** will not appear in this view. The **Binders** views, on the other hand, will display most every form available in the *Notebook*, since binders contain information which appears in many different kinds of forms.

1. Select the plus symbol (+) to the left of the database title. The various elements (**Database Forms, Database Views**) will be displayed underneath the database title in the left workspace pane.

2. Select the **Database Views** in the left workspace pane.

3. In the **View Objects** column in the right workspace pane, double-click the view to be edited. The **View Properties** dialog box appears.
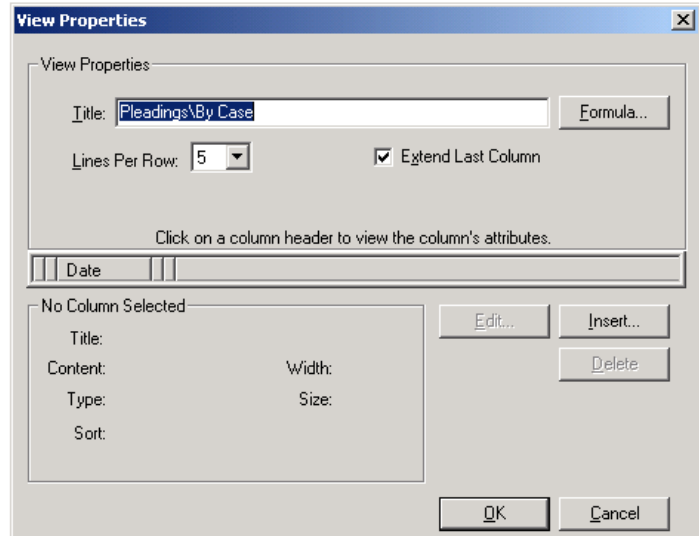
4. Click the **Formula** button at the top of the dialog box. A **View Selection Formula** appears.
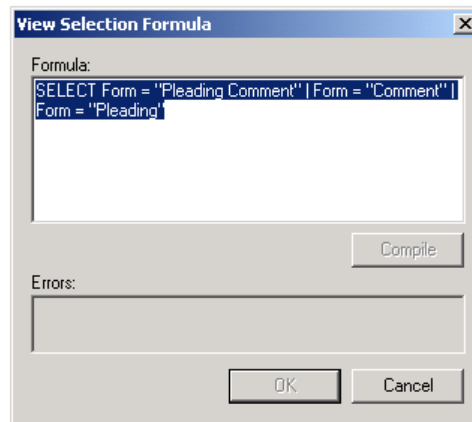
5. Change the formula in the **Formula** field and select the **Compile** button.

6. If an error occurs, the formula must be corrected before the **OK** button becomes available for selection.

Inserting a Column

Columns are the "building blocks" of a view. When you open a *Notebook* database, you will see all the information in a view organized by columns displaying date, author, subject, etc. You can add, delete and edit columns to change the way information is displayed in a view.

1. In the **View Objects** column in the right workspace pane, double-click the view name to which the column will be added. The **View Properties** dialog box appears.

2. Select the column in the dialog box that will be located to the right of the new column.

NOTE: *New columns are inserted to the left of the column that is originally selected, unless the original column is the last one in the view. Then you will be given the option to "append," which will insert the new column to the right of the originally-selected column.*

If no column is selected when you select the Insert button, the column will be inserted at the end of the view.

3. Select the **Insert** button. The **Column Properties** dialog box appears:
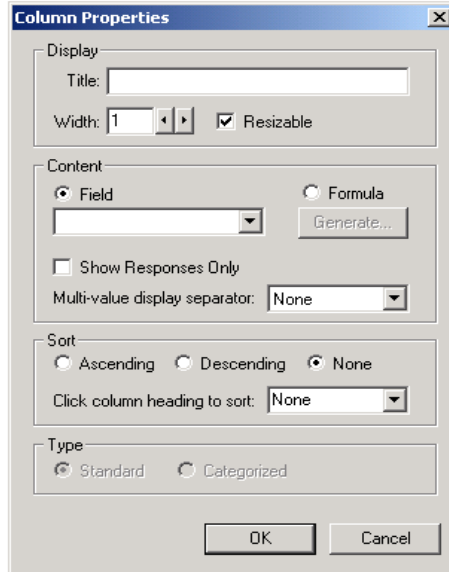
4. Use the **Column Properties** dialog box to edit the various column properties. Enter the new column in the **Title** field (optional).

5. Adjust the width of the new column using the arrow buttons to the right of the **Width** field.

6. Select the **Field** or **Formula** radio button.

NOTE: *You must choose between Field and Formula; you cannot use both.*

• If you selected the **Field** radio button, the **Field** field below will then become editable.

    a. Select the down arrow at the right of the **Field** field to display a scrolling list of available fields.

    b. Select the desired field. The field name will be displayed in the **Field** field.

    c. Select the **Show Responses Only** check box to view only the comments added to documents in the *Notebook* view pane.

       d.   Select the down arrow at the right of the **Multi-value display separator** to display a scrolling list of available forms of punctuation to separate multiple column property items.

          Select the desired **Sort** radio button: **None, Ascending**, or **Descending**.

          Select the desired **Type** radio button: **Standard** or **Categorized**.

       e.   Select **OK**.

• Instead of selecting from the **Field** field, you may select the **Formula** radio button to generate a formula.

       a.   After you select the **Formula** radio button, select the **Generate** button. A **Column Formula** dialog box appears.

       b.   Enter your formula in the **Formula** field and click **Compile**.

       c.If an error displays after selecting **Compile**, the formula must be corrected brefore the **OK** button becomes available for selection.

       e.   Select **OK**.

Editing a Column

1. Double-click the view name which contains the column to be edited. The **View Properties** dialog box appears.

2. Select a column in the center of the dialog box that will you wish to edit.

3. Select the **Edit** button. The **Column Properties** dialog box appears.

4. Use the **Column Properties** dialog box as described in the previous section to edit the various column properties.

5. Select **OK**.

NOTE: *Use caution performing this operation. If you change a JFS Formula field to another field, you will not be able to "re-add" it.*

Deleting a Column

1. Double-click the view name which contains the column to be deleted. The **View Properties** dialog box appears.

2. Select the column in the dialog box that you wish to delete.

3. Click the **Delete** button.

4. Click **OK**.

NOTE: *Use caution performing this operation. If you delete a column that contains a JFS Formula, you will not be able to "re-add" it. If you delete the Show Responses column, Comment documents will no longer be displayed in the view.*

Saving Modifications

Save all changes by selecting **File: Save** from the menu bar or **Ctrl-S** from the keyboard.

Deleting a View

NOTE: *Custom views can only be deleted, not restored. You should exercise caution when deleting custom views.*

---

1. Select the plus symbol (**+**) to the left of the database title. The various database elements (**Database Views, Database Forms**, **Binders**) will be displayed underneath the database title in the left workspace pane.

2. Select the **Database Views** icon in the left workspace pane. The view selections will be displayed in the right workspace pane.

3. Select the view you wish to delete from the database.

4. Select **Edit: Delete** from the menu bar, or **Ctrl-D** from the keyboard, or the **Delete** button. JFS views will display a red mark on the view icon, indicating that the view has been marked for deletion from the database. Custom views will be deleted and the view name will be removed from the view list.
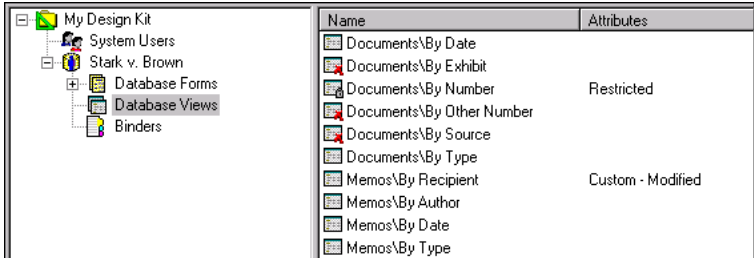
Restoring a View

NOTE: *Only JFS views can be restored.*

1. Select the plus symbol (**+**) to the left of the database title. The various database elements (**Database Views, Database Forms**, **Binders**) will be displayed underneath the database title in the left workspace pane.

2. Select the **Database Views** icon in the left workspace pane. The view selections will be displayed in the right workspace pane. Any deleted JFS views will be displayed with a red mark on the view icon.

3. Select the view you wish to restore to the database.

4. Select **Edit: Restore** from the menu bar or **Ctrl-E** from the keyboard. The view will be restored to the database.

Renaming a View

1. Select the plus symbol (**+**) to the left of the database title. The various database elements (**Database Views, Database Forms**, **Binders**) will be displayed underneath the database title in the left workspace pane.

2. Select **Database Views** in the left workspace pane. The view selections will be displayed in the right workspace pane.

3. Select the view (**Memos\By Author**, for example) you wish to rename.

4. Select **Edit: Rename** from the menu bar or **Ctrl-R** from the keyboard.

5. Type the new name for the view and press the **Enter** key.

APPENDIX A *Restricted Forms And Views*

The following **forms** cannot be deleted or renamed using *Design Kit*; however, custom fields can be added and modified in these forms:

- Chronology Item
- Chronology Memo
- Keyword
- Issue Profile
- Topic Profile

- Witness Profile

The following **views** cannot be deleted or modified using *Design Kit*; however, they can be renamed:

- Chronologies\By Calendar
- Chronologies\By Date
- Chronologies\By Name
- Documents\By Number
- Keywords
- Production History\By Case Name
- Production History\By Date
- Production History\By Event ID
- Witness Lists\By Name

APPENDIX B   *Field Names and Validation*

This appendix describes each field in the standard forms in Bowne's *JFS Litigator's Notebook*®, including its common field name, internal system field name, whether it is required, whether it is a single- or multiple-entry field, and how it is validated in the system.

NOTE: *The Site Profile Form is available only on* Design Kit 7.0. *However, in* Design Kit 7.5*, a custom binder for this purpose can be created in the* Notebook *database.*

Key to the Tables

Column Heading	Definition
Section	Major section of the form.
Common Field Name	The field label on the form.
System Field Name	The internal name by which *JFS Litigator's Notebook* knows this field; used when creating searches.
Required	Whether or not the field is required. If a field is required, the form cannot be saved until a valid value is entered for the field. In other cases, the field is not required, but it is encouraged. If an encouraged field is left blank, you are asked if this omission is intentional. If yes, the *Notebook* allows you to save the document with no value for the field.
Occurs	Whether the field accepts single or multiple entries.
Validation	Whether or not the field must be validated in order for the document to be saved. For example, the field validation may require that the data be selected from a list of approved keywords.

.

Issue Profile Form

Included in the *Notebook*. Contains identifying information about each issue.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
Header Information	Issue Profile	IssueName	Required	Single	
	Description	Description			

.

Topic Profile Form

Included in the *Notebook*. Contains identifying information about each topic.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
Header Information	Topic Profile	TopicName	Required	Single	
	Description	Description			

.

Witness Profile Form

Included in the *Notebook*. Contains identifying information about each witness.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
Header Information	Witness Profile	Wname	Required	Single	
	Type	Wit-nessType (one word)	Required	Multiple (comma)	Keyword
	Party	Witness-Party	Required	Multiple (comma)	Keyword
	Address	Wit-nessStreet		Single	
		WitnessCity			
		Wit-nessState			Keyword
		WitnessZip-Code			
		Witness-Country			
		Phone			

Witness Profile Form (Continued)

Other Numbers	AltPhone	Single	
	AltPhone-Type	Single	Keyword
		Single	
	AltPhone2	Single	Keyword
	AltPhoneType2		
E-mail Address	EmailAddress	Multiple	
Responsible Lawyer	RespAttorney	Multiple (comma)	
Status	WitnessStatus	Multiple (comma)	
Discussion	Body	Single	

.

Memo to Notebook Form

Included in the *Notebook*. Contains attorney and paralegal internal correspondence relevant to the case.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
Header Information	From	From	Required	Multiple (comma)	Keyword to Names.nsf
	Date	Date	Required	Single	Provided by system, editable
	Re:	Subject	Required	Single	
		Body		Single	
Document Information	Tab	Tab	Required	Single	Keyword
	Issue Binders (Notebook)	IssueBinder		Multiple (comma)	Keyword

Memo to Notebook Form (Continued)

Topic Binders (Notebook)	TopicBinder		Multiple (comma)	Keyword
Witness Binders (Notebook)	WitnessBinder		Multiple (comma)	Keyword

.

Mail Memo Form

Included in the *Notebook*. Contains internal correspondence relevant to the case that can be mailed to others using Notes Mail.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
Header Information	To	SendTo	Required	Multiple (comma, semicolon, new line)	Address Book
	cc:	CopyTo		Multiple	Keyword to Names.nsf
	bcc:	BlindCopyTo		Multiple	Keyword to Names.nsf
	From	From	Required	Multiple (comma)	Keyword to Names.nsf
	Date	Date	Single		Provided by system
	Re:	Subject	Required	Single	
		Body		Single	
Document Information	Tab	Tab	Required	Single	Keyword
	IssueBinders (Notebook)	IssueBinder		Multiple (comma)	Keyword

Mail Memo Form (Continued)

	Topic Bind-ers (Note-book)	Top-icBinder		Multiple (comma)	Keyword
	Witness Binders (Notebook)	Witness-Binder		Multiple (comma)	Keyword

Comment Form

Included in the *Notebook*, *Indexer Module*, *Transcript Module*, and *Pleadings Module*. Contains notes and comments that can be attached to any document.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
Header Information	Re: Line	Subject	Required	Single	
	From	From		Single	Provided by system
	Text of the Comment	Body		Single	
	Security	ReadAccess	Required if Reader List contains values	Single	Keyword
	Reader List	Access-Name	Required if Confiden-tial	Multiple	Keyword
	Date	Date	Required	Single	Provided by system

Document Synopsis Form

Included in the *Notebook* and the *Indexer Module*. Contains coded or indexed information for discovery documents.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
Header Information	Document Type	DocType	Required	Multiple (comma)	Keyword
	Document Date	Date	Encouraged	Single	Valid date (4-year)
	Date Descriptor	Estimated-Date		Single	Keyword
	Re: Line	Subject	Required	Single	
	Security	ReadAccess		Single	Keyword
	Reader List	Access-Name		Multiple	Keyword
	Document ID Number	DocNo	Required	Single	
	Ending Document ID Number	EndNo		Single	
	Attachment ID Number	AttachNo		Single	
	Ending Attachment ID Number	AttachEnd No	Required*	Single	
	Author Addressee	From OFrom PTo OTo	Required	Multiple (comma, semicolon, new line)	(Note: Only author field is required, others are optional)
	Characteristics	Characteristic		Multiple (comma)	Keyword
	Tab	Tab		Single	Keyword
	Description	Body		Single	

Document Synopsis Form (Continued)

	Issue Binders (Notebook)	IssueBinder	Multiple (comma)	Keyword
	Topic Binders (Notebook)	TopicBinder	Multiple (comma)	Keyword
	Witness Binders (Notebook)	WitnessBinder	Multiple (comma)	Keyword
Other Names	Copyees	PCopy	Multiple (comma, semicolon, new line)	
	Attendees			
	Other Names	OCopy	(semicolon, new line)	
		PAttendee	(comma, semicolon, new line)	
		OAttendee	(semicolon, new line)	
		PMentioned	(comma, semicolon, new line)	
		OMentioned	(semicolon, new line)	
	Source	DocSource	Multiple (comma)	Keyword
Content Information	Document Text	DocText	Single	
	Topics	Topics	Multiple (comma)	Keyword

Document Synopsis Form (Continued)

	Referenced Numbers	Referenced-Numbers	Multiple (comma, semicolon)	
Document Location Information	Bates Number	BatesNum	Multiple (comma, semicolon)	
	Other Production	OtherDocNo	Multiple (comma, semicolon)	
	Image Reference Fields	ImageRef1 ImageRef2		Internal Use ONLY
	Duplicates	Duplicates		
Litigation Information	Exhibits	Exhibit	Multiple (comma, semicolon, new line)	
	Privilege Type	PrivilgeType	Multiple (comma)	
	Production History	NewProductionHistory	Multiple (comma, semicolon, new line)	
	Previous Production History	ProductionHistory		
	Document Text	DocText		Internal Use ONLY

* If there is an AttachNo, there must be an ending attachment number greater than the beginning attachment number.

Transcript Form

Included in the *Notebook* and *Transcript Module*. Contains coded or indexed information for each transcript.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
	Re: Line	Subject	Required	Single	
	Begins on	BeginPage BeginLine	Required	Single	Beginning page less than ending page, or if same, beginning line less than ending line
	Ends on	EndPage EndLine	Required	Single	Beginning page less than ending page, or if same, beginning line less than ending line
	Witness Type	WitnessType		Single	Keyword
	Witness Party	WitnessParty	Required*	Single	Keyword
	Examining Attorney	ExaminingAttorney	Required	Single	
	Examining Party	ExaminingParty	Required	Single	
Document Information	Exhibits Referenced	Exhibits		Multiple	

Transcript Form (Continued)

Names	PMentioned		Multiple (comma, semicolon, new line)
	OMentioned		
Text File	TextFile		Single
Case Name	CaseName		Multiple (comma)
Text of Transcript	Transcript Text	Required	Single

*Entered when loading a transcript.

Digest Form

Included in the *Notebook* and *Transcript Module*. Contains coded or indexed information for each digest.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
Header Information	Re: Line	Subject	Required	Single	
	Page	BeginPage	Required	Single	Beginning page less than ending page, or if same, beginning line less than ending line
	Line	BeginLine	Required	Single	

Digest Form (Continued)

	through Page	EndPage	Required		Beginning page less than ending page, or if same, beginning line less than ending line
	Line	EndLine	Required	Single	
	Witness Type	WitnessType	Required*	Multiple	Keyword
	Volume	Volume	Required*		Provided by system
	Witness Party	WitnessParty	Required*	Multiple	Keyword
	Examining Attorney	ExaminingAttorney	Required	Single	
	Examining Party	ExaminingParty	Required	Single	
Document Information	Tab	Tab		Single	Keyword
	Exhibits Referenced	Exhibits		Multiple (comma)	Keyword
	Names	PMentioned		Multiple (comma, semicolon, new line)	
		OMentioned		(semicolon, new line)	
	Case Name	CaseName		Multiple (comma)	
	Digest or Summary	DocDigest		Single	
Header Information	Transcript Type*	TranscriptType	Required	Single	Provided by system

Digest Form (Continued)

	Witness Name*	Wname	Required	Single	Provided by system
	Date*	Date	Required	Single	Provided by system
	Text of Transcript	Transcript Text	Required	Single	
	Issue Binders (Notebook)	IssueBinder		Multiple (comma)	Keyword
	Topic Binders (Notebook)	TopicBinder		Multiple (comma)	Keyword
	Witness Binders (Notebook)	WitnessBinder		Multiple (comma)	Keyword

*Entered when loading a transcript

.

Correspondence Form

Included in the *Notebook*, *Indexer Module*, *Transcript Module*, *Pleadings Module,* and *Correspondence Module.* Contains correspondence about a pertinent case.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
	Correspondence Form	Correspondence Form	Required	Multiple	Keyword
	Correspondence Date	Date	Encouraged	Single	MM/DD/YY
	Document ID Number	Docno	Required	Single	<=Doc ID No
	Ending Document ID Number	EndNo	*	Single	> = End Doc ID No

Correspondence Form

Personal Names Author Addressee Copyee Other Names	From PTo PCopy PMen- tioned	Required	Multiple	(Note: Only the author field is required; others are optional)
Organiza- tion Names Author Addressee Copyee Other Names	OFrom OTo OCopy OMen- tioned		Multiple	
Characteris- tics	Characteris- tic		Multiple	Keyword
Received Date	Received- Date		Single	MM/DD/ YY
Subject Line or Re: Line	Subject	Required	Single	
Description	Body		Single	
Security	ReadAccess	Required	Single	Keyword
Reader List	Access- Name	Required if Security is Confiden- tial	Multiple	Keyword
Tab	Tab	Required	Single	Keyword
Issue Binders	IssueBinder		Multiple	Keyword
Witness Binders	Witness- Binder		Multiple	Keyword
Topic Bind- ers	Top- icBinder		Multiple	Keyword
Document Text	DocText		Single	

* If there is an AttachNo, there must be an ending attaching number greater than the beginning attachment number.

Clean Sheet Form

Included in the *Notebook*. Used to capture any type of document, correspondence, and research, and display the work product in its original format.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
Header Information	Subject or Re: line	Subject	Required	Single	Keyword
	Security	ReadAccess		Single	Key word
	Reader List	Access-Name		Multiple	Keyword
	Author	From	Required	Single	Provided by system
	Date	Date	Required	Single	Provided by system
Document Body	Body	Body			
Document Information	Type	WorkProductType	Required	Multiple	Keyword
	Issue Binders (Notebook)	IssueBinder		Multiple	Keyword
	Topic Binders (Notebook)	TopicBinder		Multiple	Keyword
	Witness Binders	WitnessBinder		Multiple	Keyword

.

Chronology Item Form

Included in the *Notebook*. Used to track the chronology of a case.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
	Chronology	Chronology	Required	Single	Keyword

Chronology Item Form (Continued)

	Date	ChronDate	Required	Single	Chronol-ogy Date
	End Date	ChronEnd-Date		Single	
	Time	ChronTime		Single	
	End Time	ChronEnd-Time		Single	
	Subject or Re: line	Subject	Required	Single	
	Source	Chron-Source		Single	
	Source Date	Chron-SourceDate		Single	
	Security	ReadAccess		Single	Keyword
	Reader List	Access-Name		Multiple	Keyword
	Comments	Comment			

Keyword Definition Form

Included in the *Notebook*, *Indexer Module*, *Transcript Module*, *Correspondence Module* and *Pleadings Module*. Contains values that are used in controlled vocabulary fields.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
	Category	Keyword-Category	Required	Single	Keyword
	Short Name for Keyword	Subject	Required	Single	
	Definition of Keyword	Body			

Pleading Form

Included in the *Notebook* and *Pleadings Module*. Contains coded or indexed infor-
mation for each pleading.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
	Document ID Number	Docno	Encour-aged	Single	
	Ending Doc-ument ID Number	EndNo		Single	
	Pleadings Type	Pleading-Type	Required	Single	Keyword
	Date Filed	Date	Required	Single	MM/DD/YY
	Case Name	CaseCap-tion		Single	Keyword
	Case Num-ber or Docket Number	Docket-Number		Single	
	Filed By	From	Required	Multiple	Keyword
	Filed Against	FiledTo		Multiple	Keyword
	Subject Line or Re: Line	Subject		Single	
	Security	ReadAccess	Required	Single	Keyword
	Reader List	Access-Name	Required if security is Confiden-tial	Multiple	
	Body	Body		Single	
	Response Assigned To	AssignedTo		Multiple	
	Response Due	Response-Due		Single	mm/dd/yy

Pleading Form (Continued)

	Response Answered	Response-Answered		Single	mm/dd/yy
	Related Documents	Related-Documents		Single	
	File Number	Oth-erDocNo		Multiple	

Calendar Event Form

Included in the *Notebook* and *Pleadings Module.* Contains information to create a calendar event.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
	Type	Type	Required	Single	
	Duration	All-DayEvent	Required	Single	
	Start Date	StartDate	Required	Single	
	End Date	EndDate	Required	Single	
	Start Time	StartTime	Required	Single	
	End Time	EndTime	Required	Single	
	Subject	Subject	Required		
	Required Attendees	ReqAttend	Required	Multiple	
	Optional Attendees	OptAttend		Multiple	
	Description	Description			

Task Form

Included in the *Notebook* and *Pleadings Module*. Contains information to create a task.

Section	Common Field Name	System Field Name	Required	Occurs	Validation
	Subject	Subject	yes		
	Task Type	TaskType	yes		
	Priority	Importance	yes		
	Start Date	StartDate	yes		
	Due Date	DueDate	yes		
	Assign To	SendTo			
	Assigned To	AssignedTo			
	cc:	CopyTo			
	Additional Information				

APPENDIX C   *Description of Forms*

This appendix describes each standard form in *JFS Litigator's Notebook*® that may be modified using *Design Kit* and in which module they are included.

Form Name	Description	Included In
Memo to Notebook	Attorney and paralegal internal correspondence re: case	*Notebook*
Memo for Mailing	Internal correspondence re: case that can be mailed to *Notebook* or to others on Notes Mail	*Notebook*
Comment	"Post-It" notes and comments you can attach to any document	*Notebook Indexer Module, Transcript Module, Pleadings Module*
Clean Sheet	Used to capture any type of document, correspondence, research paper, etc. and display the work product in its original form	*Notebook*
Calendar Event	Used to add a specific dated event to the *Notebook* calendar.	*Notebook Pleadings Module*
Document Synopsis	"Coded" or indexed information of discovery documents	*Notebook Indexer Module*
Pleading	Documents issued by or filed with the court.	*Notebook Pleadings Module*
Task	"To-Do" items assigned to various parties. May be included on the calendar.	*Notebook*
Transcript	Header and descriptive information of Deposition or Transcript and general information	*Notebook Transcript Module*
Digest	Carries deposition summaries and related deposition text	*Notebook Transcript Module*
Keyword Definition	For defining lookup values for controlled vocabulary fields	*Notebook Indexer Module Transcript Module Pleadings Module Correspondence Module*
Profile Form	For creating Topic, Issue and Witness Binders	*Notebook*

Correspondence Form	For storing correspondence pertinent to a case.	*Notebook Correspondence Module*
Chronology Item	Creates a timeline of events that occur in a case (linked and unlinked)	*Notebook*
Production Event	Stores information for produced documents	*Notebook Indexer Module*

Appendix D *Glossary*

Term	Explanation
database	Computer storage site for information. Also known in Lotus Notes as a *module*.
dialog box	A window that appears on the screen to provide options.
field	A slot within a form where data is entered.
filepath, path	The location of a file in a directory.
form	A collection of blank fields used to enter data.

Term	Explanation
icon	A small picture that represents a file, directory, or action.
mapping	Transferring one set of objects from one file in a particular format into another file in another format.
menu bar	A list of functions across the top of the screen.
module	Lotus Notes term for a *database*.
network directory	Listing of computers connected on a system.
radio button	Allows selection of a program function.
server	A program that assists other programs on a computer.
template	Pre-formatted data file before the fields are filled in with information.
workspace pane	Portion of a window containing a list of files.

Index