CC:MAIL MOBILE FOR WINDOWS 95

QUICK GUIDE

(for version 6.03)

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INTRODUCTION

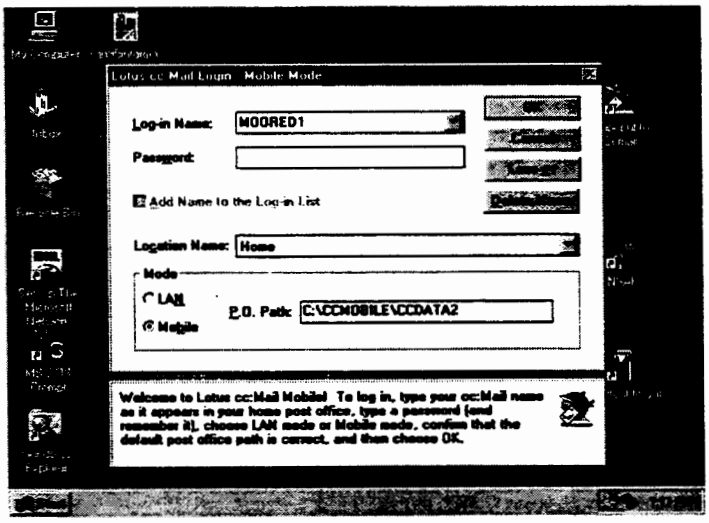
The following is not meant as a complete guide, but should provide the basics that you will need to receive and send messages. All mouse clicks are with the left button (also called the *primary button* for the Toshiba AccuPoint), unless otherwise noted.

As a reminder, one of the Menu items at the top of the cc:Mail window is Help. You should click on this if you need/want help beyond what we have included here.

If you are working in an application and want to check your messages or send a message, you do not have to close the application to get to cc:Mail. You can reduce your application and go to the Windows Desktop to get to cc:Mail, or select Start on the TaskBar and move to Programs, Windows Applications, CC_Mail Mobile.

A. TO START CC:MAIL

While in the Windows Desktop, double click on the cc:Mail icon.



This is the Login window. The cursor will be flashing in the box for your Password. Type your password (wes). (For security reasons, it will not display as you type it in.) Do not press the Enter key yet.

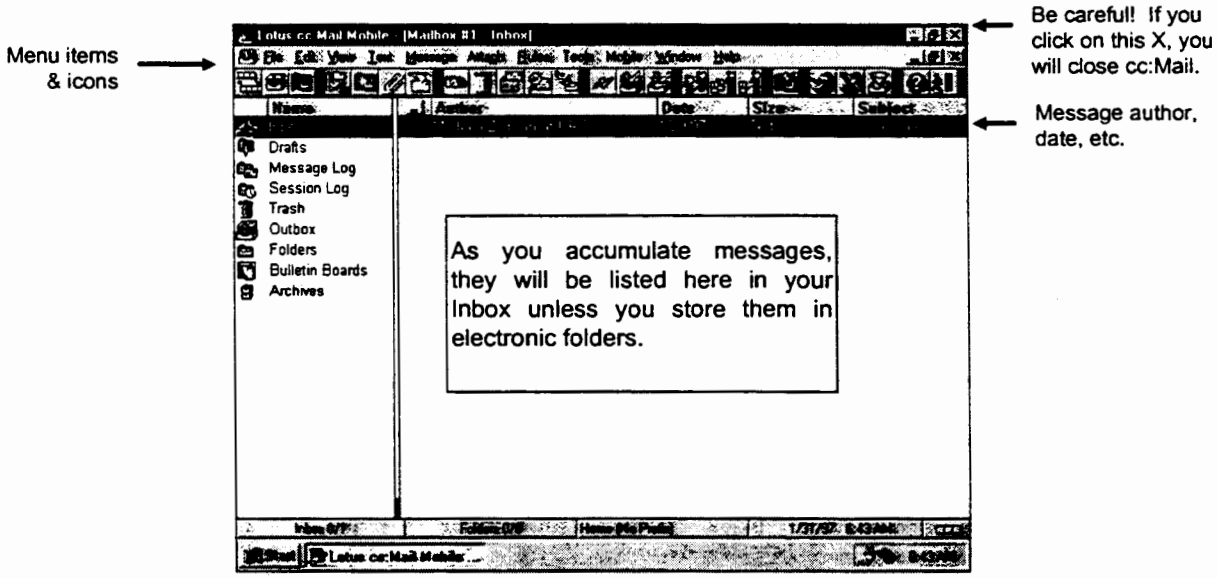
If your Login window is only about half as large as this example, look for the button labeled "More >>" and click on it.

Look at the "Location Name" field. If you are working at home, this field should read "Home". This setting controls the way the system dials when you send or check for messages.

If you need to change the setting so that you can call out from a hotel room, for example, click on the down-arrow button on the right of the Location Name field. Then, click on the appropriate setting. (The location can be changed and the dialing routine modified from within cc:Mail. See Sec. K. Changing the Location Setup.)

Click on the OK button.

This is the main cc:Mail screen:



Hold your mouse pointer on one of the icons for a second and you will see a brief explanation of the icon. Reminder: all of the features accessed by the icons can be found by clicking on the various Menu items (above the icons). You can either click on an icon or use the Menu items.

As noted in the exhibit above, as you receive messages, you will see them listed on this Inbox screen with author, date message sent, size of the message (t = text message), and subject given to the message by the author.

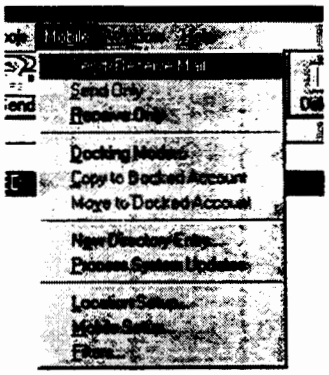
B. CHECKING FOR MESSAGES.

REMEMBER, YOU MUST CALL WESTAT WITH YOUR COMPUTER TO SEE IF THERE ARE ANY MESSAGES WAITING FOR YOU. You do not have to send a message when you want to check for messages.

First, be sure that your computer is connected to your telephone line.

To check for messages, click on the *Send and receive mail* icon,

OR



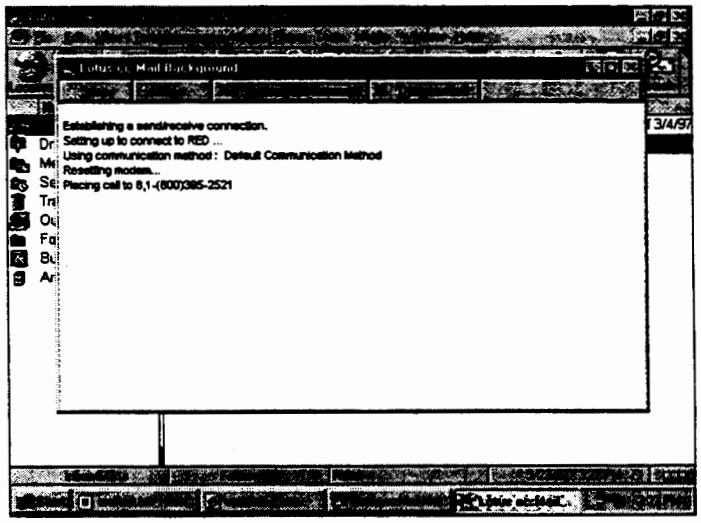
Select Mobile on the Menu line and Send/Receive Mail.

Your computer will take over and call Westat.

As the systems talk to each other and messages are copied into your computer (if there are any), information will be displayed in a window so that you can tell what is happening.

As the call is placed, the screen might look something like this.

(Do not worry if the telephone number being called is different from the one you see in parenthesis here. They will differ by study.)



If you have received any new messages, they will be listed at the top of the list of messages in your In Box and highlighted. See the next section for reading a message.

C. READING A MESSAGE.

To read a message in your Inbox, first, be sure that you are in the Inbox by checking what the screen shows you at the very top. It should say, "Lotus cc:Mail Mobile – [Mailbox #1 – Inbox]". If you are not in the Inbox, click on the Inbox icon.

Move the mouse pointer to the line with the author, etc. of the message, and double click. This will take you into the message.

After you have read the message, you should "close" it. Close the message by clicking on the small icon to the left of File on the Menu line and move down to and click on Close.

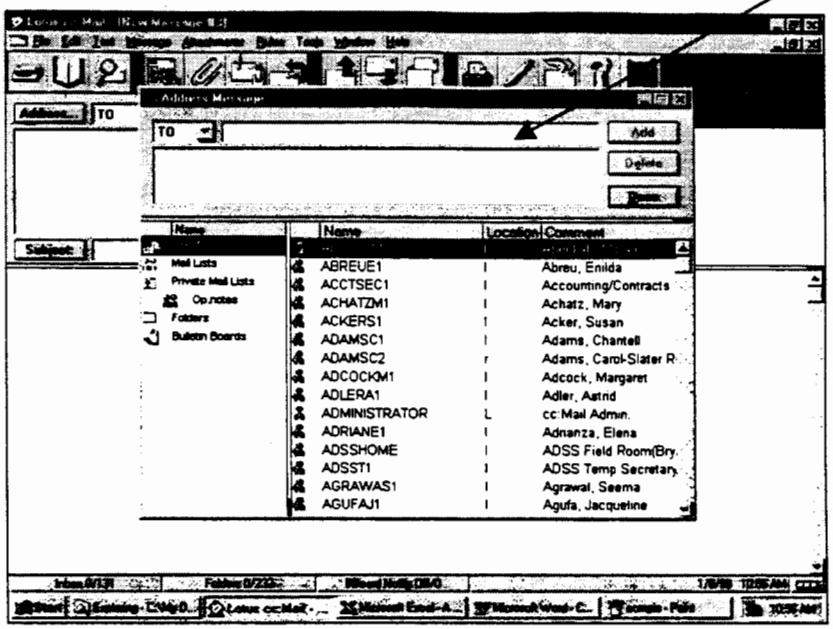
To read a message in your Outbox (composed, but not sent as yet), double click on Outbox (left column of your Inbox window). You will see a list of the messages waiting in your Outbox. Move the mouse pointer to the line of the message you wish to look at, and double click. After looking at the message, click on the icon to the left of File on the menu line and click on Close to close the message.

Follow these same procedures to read a message in your Message Log, Drafts, or Folders.

D. CREATING A MESSAGE.

To create a message, click on the *Create new message* icon (Menu item Message, New Message option).

The new message window will open with the cursor blinking on the address line.



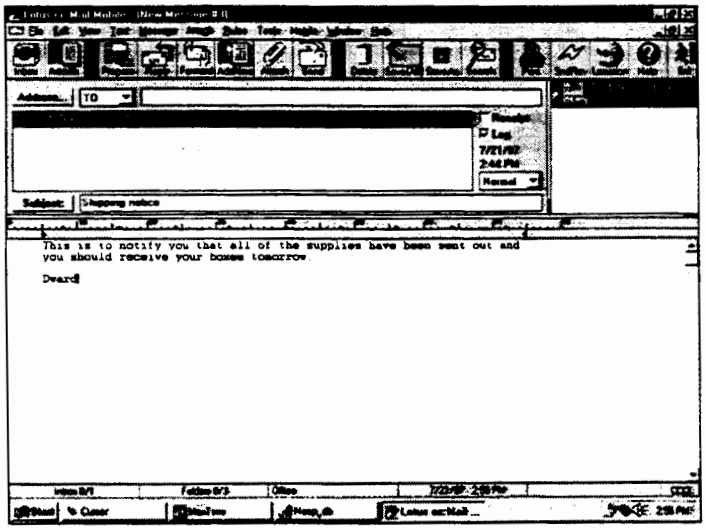
If the Address Message window is not open on top of the New Message window (as in the above example), click on the Address... button and it will open, showing you the addresses in your address book.

You might find it helpful as you address the message to see a list of all of the names (addresses) in your computer. (In the example above, you see the beginning of the list of addresses in the main Westat post office. Your list will be much shorter.) Click on the name of the person you want to send the message to and then on the Add button. If you want to send the same message to someone else, click on his or her name and on Add again. As you add names to your address list for this message, you will see them displayed in the TO: box. When you have finished addressing the message, click on the Done button.

If you want to send a copy of the message to someone, click on the down arrow button next to TO. This gives you the option of sending a copy (CC) and, if you wish, a blind copy (BCC) to someone. To send a copy, click on CC and then on the name of the person to whom you want to send the "carbon" copy.

When you have completed the addressing of your message, move your cursor to the Subject box. You should always give your messages a subject so that the recipient will know what the general subject of your message is when he/she looks at the list of messages in the Inbox. Type in your subject and press the Enter key.

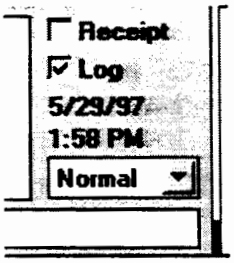
Now you are in the message portion of the system. Type your message and do not forget to "sign" it (put your name at the end of the message).



When you write a message, the screen will look similar to this. If you write more than will fit within the window, you can scroll up and down through your message by clicking on the scroll bar on the right or using the PgUp and PgDn keys.

You can move your mouse pointer back up to the Subject box and even to the Address box any time you want to make a correction or change.

Notice the two small boxes labeled Receipt and Log to the right of the name of the person to whom you have addressed your message.



Receipt. Click on the word or on the box (putting a small check in the box) if you want to be notified when your message is delivered and read.

Log. A check here results in a copy of this message being stored in your Message Log electronic folder.

When you have finished composing your message, click on the *Send* icon. Clicking on Send will not actually "send" the message, but place it in your Outbox so that it is ready to send.

E. SENDING MESSAGES.

First, be sure that your computer is connected to your telephone line.

When you send messages, you will follow the same steps that you follow when you want to check for messages (Section B) and do not have a message to send.

You can compose several messages and store all of them in your Outbox before sending them all at the same time.

When you are ready to send your message(s), click on the send and receive icon (or Mobile, Send/Receive Mail).

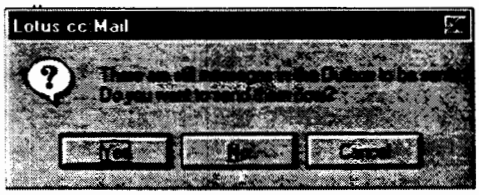
Listen and watch the screen as your computer gets set up to dial and connect to the Westat computer. If you are successful, you should hear the computer as it "dials" Westat and connects and you should see information on your screen telling you what is happening. You should see something similar to the following:

```
Lotus cc:Mail Background

    Establishing a send/receive connection
    Setting up to connect to Westat
    Using communication method: Default Communication Method
    Resetting modem..
    Placing call to 1-(800)643-8564
    CONECT 9600/ARQ
    Connecting to Post Office...
    Connection accepted (HSEC)
    Preparing to send outbox messages...
    1 messages sent.
    Waiting for confirmation that message was successfully sent...
    Preparing to receive messages...
        AUTHOR          DATE    SIZE    SUBJECT
    MOORED1@WESTAT  2/30/99  3k t    Greetings.
    1 Messages accepted
    Hanging up the telephone...
    Telephone is on-hook.
```

This information box will close when the messages have been sent and received, so you should watch to be sure that all went well. When your message has been sent and waiting messages (if any) have been copied, this information box will close and you will be returned to you Inbox.

If, for some reason, your computer cannot make a connection, the following will occur. The Lotus cc:Mail Background window will be minimized to a button on your TaskBar and the following small window will pop up in the middle of your screen.



Since the original attempt was not successful, select No.

If you did not notice that the connection was not completed, and if you see the above pop up window, you should check the TaskBar for a button that was not there before. It should look like this:

Click on the button and a message similar to the one below should be displayed:

```
Lotus cc:Mail Background

    Establishing a send/receive connection
     Setting up to connect to RED..
     Using communication method: Default Communication Method
     Resetting modem..
     Placing call to 1-(800)643-8564
     Call not established.
    ------------------------------------------------------------
     2/30/99 8:00PM Lotus cc:Mail Background, R2.22
     The current Location is: Home
     Press Start to make another connection...
```

The system will tell you that the call was not established and may give you some helpful information. It is also possible that it just states, as it does in this example, that the connection was not established.

As you can see in this message, the system was set to dial from home. If you see this error message, you may need to change to the Location Setup to Hotel so that the initial number 8 is dialed before the toll-free number.

Since it is easy to not notice that the connection was not successful, be sure to watch the TaskBar if anything strange seems to be happening. It just may be that there re two buttons on it that are labeled Lotus cc:Mail. It there are, then you should click on the one that is furthest to the right (closet to the clock).

You can try again to send your message by clicking on the Start button located at the top of the small window.

If you encounter repeated failed attempts in connecting (DO NOT try more than three times), make a note of any error message that you have received and call your field manager.

Since all data transmissions and e-mail communications are routed through the Westat office, if there is a problem in transmitting data, there will most likely be a problem with e-mail transmissions as well. They both use the same basic system at the Westat offices.

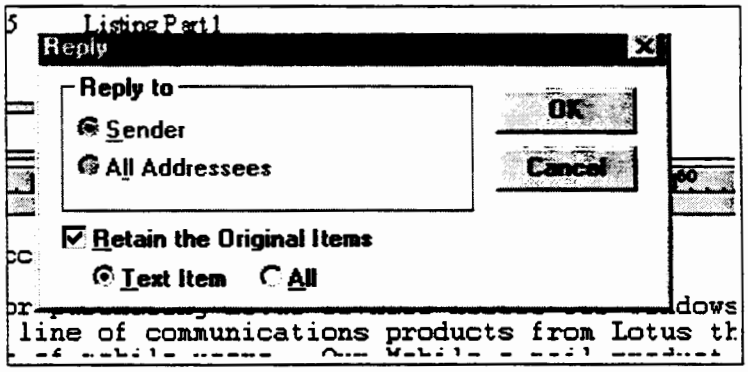
If you are experiencing problems in connecting as you try to send and/or receive messages, we suggest that you wait a short while and try again. The systems are monitored during weekdays (but, **not** on the weekends) and, if there is a

problem on our end, it is usually corrected within a few hours at most (on weekdays only).

When you attempt to send data or e-mail messages, you should hear the following through the computer speaker: the telephone dial tone, the electronic tones as the computer dials the toll-free number, and the computer answering at Westat. If you DO NOT hear any of these sounds, the first thing you should check is the telephone cord connection. If this appears to be a good connection, the problem is probably somewhere between you and the office.

F. REPLYING TO A MESSAGE.

While you are reading a message, you may want to reply to the author (and possibly to all who were sent the same message). With the message open on your screen, click on the reply icon (or Message, Reply) and the small Reply dialog box will overlay your message.



If the message has been addressed to several people, you can elect to reply only to the author ("sender") or to all addressees by clicking on the proper place. (The message in the above example had only been sent to one person, so this second option is grayed out.)

If you do not want to send the original message back with your reply, click on "Retain the Original Items" to delete the check mark.

Leave the "Text Item" and "All" as they are. (No change is needed here.)

Click on OK. You will be returned to the original message which is now addressed to the person who sent it to you. Your cursor is flashing in the message screen.

Add your comments, sign the message, and click on Send.

G. INBOX, DRAFTS, MESSAGE LOG, ETC.

On the left side of the main cc:Mail screen (the Inbox window), you will see the names of several electronic files used for storing messages.

Messages are stored under these names as you create them, receive them, and store them.

Briefly, these electronic files are:

Inbox	Messages are stored here when you receive them.
Drafts	You can store a draft of a message here, if you want to return to complete it later. While composing the message, click on the Draft icon or select Message, Save, Draft.
Message Log	If you click on Log when addressing a message, a copy will be stored here when you send the message.
Session Log	You will not use this.
Trash	You can store messages here rather than deleting them if you think you might want to read them again. (See Deleting A Message.)
Outbox	When you create a message and select Message, Send, it is stored in your Outbox.
Folders	You can create several electronic folders to store messages by subject, by author, or any other category you choose. (See "To Create A Folder" below.)
Bulletin Boards	You will not use this.
Archives	Similar to Folders, this is designed for network users of cc:Mail. You will not need this feature.

H. DELETING A MESSAGE.

If you want to delete a message, highlight the line containing the message author, etc. by clicking on it.

Click on the delete icon (or Message, Delete Message).

A double-check window will come up to be sure you want to delete the message.

To move a message to the Trash folder, click once on the line containing the message author. Hold down the left mouse button and drag over to Trash.

I. TO CREATE A FOLDER.

You may want to store your messages organizing them by author, subject, or other common feature. (For example, you may want a folder for Westat office messages and one from your field manager.)

To create one or more electronic folders in which to store your messages:

- First, click on File on the Menu line.
- Pull down to New and a drop-down list will appear to the right
- Carefully move your mouse pointer over to Folder and click. (Or, since the F is underlined, you can press the letter F on the keyboard.)
- In the left column there is now a place under Folders for you to enter the name you want to give to your folder. Enter the name and press the Enter key.

To create additional folders, repeat these steps.

To move a message to a folder, see the next section.

J. Moving a Message into a Folder.

To move a message, "click and drag". Click and hold the left mouse button on the line with the message author, etc. in your Inbox. As you drag the message into the left column it changes to a small icon. Move the icon down to the folder name you have created. When you are on top of the folder name, release the mouse button.

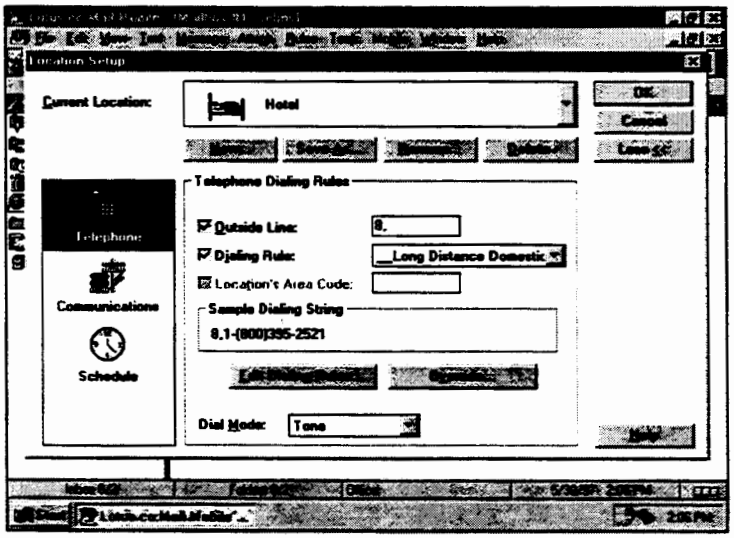
A Move window will appear to confirm that you want to move the message. Click on OK (or press the Enter key).

The message will be moved into the folder and deleted from your list of Inbox messages.

K. Changing the Location Setup

Your system is set so that if you indicate your location as "Hotel", the computer will dial an 8 before the Westat number. If you have set your location to "Home", there will be no prefix (other than the normal 1). You can check the setting and modify it if necessary.

To edit or check your location profile, click on Mobile, Location Setup. Your current location name will be displayed as in this example.



In this example, the location profile is set for a hotel. To reach an outside line, the system will dial an 8. The comma following the 8 sends the system a signal to pause briefly before continuing with the number.

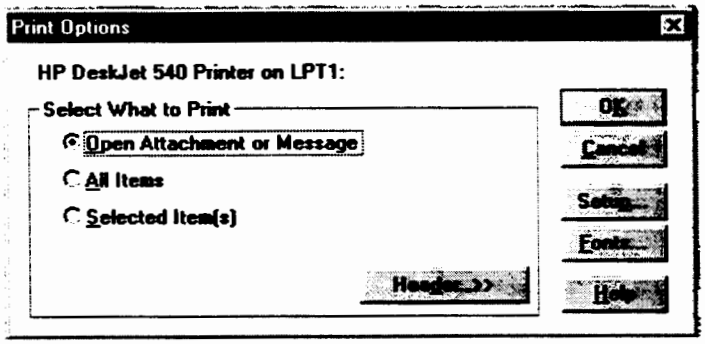
If the pause is not long enough, you can add a second comma. If your hotel requires some other number to reach an outside line, delete the 8 and enter the proper number(s).

You can check on the other location profiles by clicking on the down arrow button beside the location name.

When you start cc:Mail Mobile, if you do not set the location profile, you can do so from here. Whatever location is displayed when you leave the profile window by clicking on the OK button is the one that will control the dialing when you send a message.

L. Printing a Message

If you have a printer attached to your computer, printing a message is a quick process. With the message displayed on the screen, click on the print icon.

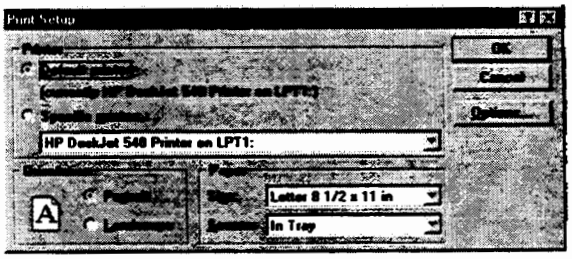


The Print Options dialog box is displayed asking what you want to print. "Open Attchment or Message" is the default.

Click on OK to print the message.

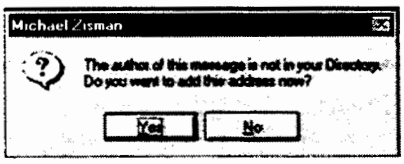
The printer is identified at the top of the Print Options dialog box.

Before printing a message, you can check to see what printer the system is expecting (and change it if necessary) by clicking on File, Print Setup. The Print Setup dialog box is displayed.



M. Adding a Name to Your Directory

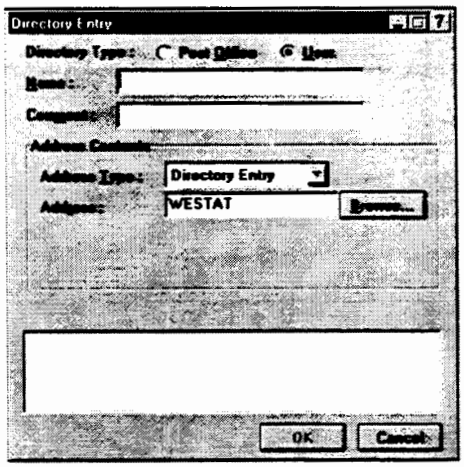
When you receive a message from someone who is to listed in your address book, you will get an opportunity to add them. When you double click on the message, a small dialog box opens notifying you that you have received a message from someone not in your address book.



Click on the Yes button and the name will be added to your address book.

If you want to "manually" add a person to your address book, you must know exactly how that person's name appears in the Westat post office or your project's post office within the larger Westat post office.

On the menu line, select Mobile, New Directory Entry to get this Directory Entry window.

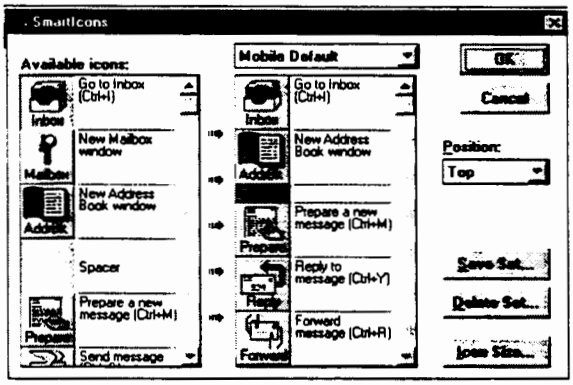


Enter the individual's e-mail address in the field labeled "Name". Enter anything you want in the Comments field such as the person's full name.

Leaving all the other fields as they are, click on the OK button and the address will be added to your address book.

N. ICONS

If your system does not have some of the icons noted in this guide, or there are others that you would like to add to the top of the screen in your system (or some that you would like to remove), you can add or remove icons easily.



From the menu at the top of the screen, select Tools, SmartIcons and the SmartIcons dialog box appears.

The various icons that are available to be displayed are shown on the left. The icons that are currently selected for display in your system are in the center of the box. To add an icon to your system, click and drag on the icon from the left column of icons to the right and release it. You remove an icon in the same way; click and drag it to the left.

There are several sets of icons available in the system. Clicking on "Mobile Default" will result in a specific set of icons being identified for display on your system. Clicking on the down arrow button next to "Mobile Default" will result in a list of several other names of icon sets being provided for you to choose from if you wish.

Listed below are the icons that are usually set up with your system:

Go to Inbox
Open Address Book window
Create new message
Create new Directory entry
Send message
Reply to message
Forward message

Delete message(s)
Search for messages or addresses
Send and receive mail
Print list, message(s), or attachment(s)
Create or modify location profiles
Save message to Drafts folder
Exit from cc:Mail

N. Adding a Name to Your Address Book (study may not want this accessible to staff)

You must know the individual's "address" to be able to add them to your system. By their "address", we actually mean how they are identified in the Westat e-mail post office. If you look in your e-mail address book (click on the *Open Address Book* window icon or select Window, New Address Book Window), you will see the addressing convention used in this system.

The addresses are limited to a total of eight characters and usually have the following structure -- the first 5 letters in the person's last name, initial of first name, and a number (usually 1) -- as illustrated below:

MOORED1.

If you need to add a person's address to your system, you will first need to determine what their e-mail address is. Then follow the steps below:

- Click on the *Create new Directory entry* icon (or select Mobile, New Directory Entry and the Directory Entry dialog box will open.
- This will be a "user", so leave the Directory Type as it is.
- In the Name field, enter the person's e-mail address exactly as it is given to you.
- In the Comment field, enter the person's full name.
- The "Address Contents" should remain as they are.
- Click on the OK button, and you should see the person's address in your address book.

(The "Location" has been entered by the system. The lower case r means that they are considered a remote user as opposed to a local user. Only you can be local since this is the system assigned to you. The upper and lower case "P" (if you have both) refer to post offices at Westat.)

Reminder: If you do not enter the address exactly as it appears in the Westat home post office, the system will not recognize it and you will get an error message when you try to send them a message. Capitalization is usually important, so enter the address just as you receive it. Since the information that you enter in the Comment field is only displayed on your system for reference, it does not matter whether you use capitals or not.