Lotusphere 2012

Business. Made Social.

BP102 User Blast

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Agenda

- Know your Notes
- Super Short-Cuts
- Bitchin' Bookmarks
- Sizzlin' Search
- Wonderful Widgets
- Amazing Actions
- Powerful Plug-Ins
- Get Social
- No widget, no plug-in, no problem
- Tie it all together – get productive with Lotus Notes
Know your Notes
Know Your Notes: Notes IS Easy

- Users need to:
  - Recognise how easy it is to work with Notes
  - Understand the power available in the Notes client

- Administrators need to:
  - Enable their users with powerful policies
Know Your Notes

- General UI and features
- Sidebar
- Open List/Bookmark Bar
- Standard Database layout
Notes Client General Layout

- Menu's
- Window Tabs
- Open button
- Tool-bars
- Home Screen
- Search-Bar
- Side-Bar
- Status Bar
- Change Home Screen
- Home Screen quick links
The Notes Side-bar

- The Side-bar contains Widget's and Plug-ins
- Ctrl+4 (Open) Ctrl+3 (Dock) Ctrl+0 (Hide)
'Open Button' or 'Bookmark Bar'

- Open Button
  - Right-Click Open Button
  - Choose 'Dock'

- Bookmarks
  - Right-Click Bookmarks
  - Choose 'Large'

- Large Bookmarks
Database (Application) Layout

- Notes applications all have the same layout

8. *'Standard' Database

'Classic' Database
Preview and the “Show” command
Thumbnails button
Know your Notes

- Use Preview to work faster (less window management)
  - Preview on side or bottom For all PIM apps (Mail, Calendar, Contacts, To-Dos, Notebook)
  - Research says: use Preview on side for faster reading!
  - Use the Show action bar button to manipulate the preview
    - And to manipulate other appropriate things

Contacts has choice of list and biz cards

Mail has choice of “individual messages” and conversations
Know Your Notes

- Advanced menus (on File and Tools)
  - Are off by default
  - Unless you install Designer or Admin client
Know your Notes

- Show Thumbnails Button and menu item to help you find your window
Super Short-Cuts
Super Short-Cuts

- Those things that make it quick and easy to interact with your Notes client
- Shortcut tip sheet (for prior to Notes 8.5):
  - http://www.badkey.com/db/files.nsf/c5850bb3aa807d82c1256bde00778c7a/022f43fbcdec62b1c12573890052b93c/$FILE/shortcuts6.pdf
- “Framework” shortcuts:
  - CTRL+M Create a message from anywhere in Notes
  - Close a window: Escape,
  - Find a window (Show Thumbnails): CTRL+Shift+T (works in Symphony too!)
  - Shift+CTRL+L Gets you a list of ALL the shortcuts available on your current screen!
Database Short-Cuts

- **Enter**
  - Open a Document/Go to Next Document

- **Backspace**
  - Previous document

- **F4**
  - Next unread message
    (or tab if you have a document open)

- **Insert**
  - Mark a document as Read/Unread
Bitchin' Bookmarks
Bitchin' Bookmarks

- Access anything easily
- Launch Tabs automatically
- Create new documents
- Controls the Welcome screen
Bookmarks – Access Anything

- Bookmarks can be:
  - Notes applications
  - Other programs
  - Web sites
  - Short cuts and Links
Bookmarks – How to add them

- Right-Click any Window Tab and choose: 'Create Bookmark'
- Choose a Bookmark location and then 'Ok'
- OR
- Drag Window Tab to the Bookmark Bar
Bookmarks – Add items to Notes Startup

- Startup bookmarks load as Tab's when Notes starts
- Any bookmark can be loaded at Startup
- Add Bookmarks to:
  - 'More Bookmarks' (folder)
  - 'Startup' (folder)
# Bookmarks – Create Documents

- 'Create' bookmarks appear on the 'New' tool on the toolbar
- Any blank Notes form can be added to the 'Create' list
- Add Bookmarks to:
  - 'More Bookmarks' (folder)
  - 'Create' (folder)
Bookmarks – Change the 'Home' screen

- Any Notes Database or Web-site bookmark can be set as the 'Home' screen
- Right-Click the Bookmark
- Choose 'Set as Home Page'
- (reset to default by choosing 'Bookmarks' as Home)
Easily locate Bookmarks

- Locating bookmarked items easily
- Workspace new icons
- Workspace is “in” the bookmark bar plus included in type-ahead
Locate Bookmarks easily: use “Type to find”

The items returned INCLUDE items in the folders
Search Workspace from the “Type to Find”

Every Workspace tab is also a Folder (complete with corresponding color!); thus, using “Type to find” lets you find applications on your workspace.

Workspace: Three applications on my “Customer Info” tab
Sizzling Search

- Search Toolbar: Making it easy to “Search all”
- Search Toolbar automatically changes scopes
- How you can add applications and other things to the Search Toolbar
Search Toolbar Scope defaults to “All”

No more need to switch to all docs view to search all your mail!

If you switch to Calendar, the scope automatically switches

Switch to any VIEW and the scope automatically switches to the “all “(or $Search) view
Search a scope without having to go to that app

I'm in mail, with the “search all Mail default”

But without leaving mail, I can search all Calendar

Results open in a new tab
Easy to add search scopes to the toolbar

If you open an Notes app (not the java ones), you get a choice to “always show in search list”
SuperTip – open Java apps with CTRL+ALT to add them to the search-scope!
Searching within ANY Notes Database
Searching Notes databases is an essential skill

- Quick Search
- Find
- Full-Text Search
Search: QuickSearch

- Navigate quickly to any document in a view
- Sort the view by the required column
- Start typing the information to find

Sort by a column

Start Typing

Notes finds the match
Search: Find

- Find matching text *anywhere* on the screen
- Unlike Quicksearch, no need to sort by any column
- Ctrl+F
- Type the text to find:
  - Enter for first match, Enter again for next match

[Enter] or [Find Next] to go to next match
Search: Full-Text

- THE most POWERFUL feature in Lotus Notes
- Locate content in ANY Notes document - EVEN INSIDE ATTACHMENTS!
- Available from:
  - 'Search Toolbar' or
  - View → Search This View
New search and other stuff in 8.5.3
Search Mail by Sender or Subject – NEW in 8.5.3

<table>
<thead>
<tr>
<th>Mail File Replica on</th>
<th>Full-text Indexed</th>
<th>Not Indexed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server</td>
<td>8.5.3 Client, 8.5.3 or older Server</td>
<td>8.5.3 Client, 8.5.3 Server only</td>
</tr>
<tr>
<td>Local</td>
<td>8.5.3 Client</td>
<td>8.5.3 Client</td>
</tr>
</tbody>
</table>
Sort by Subject Removes Re and FW

- Note: This feature requires the 8.5.3 mail template, an 8.5.3 Client, and an 8.5.3 Server (if your mail file is local, you only need the 8.5.3 Client).
New Slide-in Mail Alerts

Same preference

New behaviour
Find the right person w/ new type-ahead preference

If you have a large directory – people w/ the same names, then choose which additional attribute to display

See it in the email type-ahead
Finding up-to-date info in 8.5.3 Calendar

- When Proposing a New time, keep a placeholder for the original time
- Update Meeting invitees when people are added or removed
- Preference for updating meetings automatically
- Forward iCal Subscriptions
- Duplicate Calendar entries are merged
Finding up-to-date info in 8.5.3 Calendar

- Forward iCal Subscriptions
- Duplicate Calendar entries are merged
Wonderful Widgets
Wonderful Widgets

- They're wonderful because they
  - Save time
  - Save keystrokes
  - Aggregate info
  - “Open up” the Notes client for easily displaying/using web pages
  - You don't have to be a programmer to include Widgets in Notes

- Lotus learning widget
- Add (almost any) Google gadget
- Add any Notes application to the sidebar
Get and use the Lotus Learning Widget

- Just drag to add it (more on how to deploy for dummies later)
Add any Google Gadget to your Sidebar

- Goal: Get the currency converter Google Gadget (from the Google Gadget catalog), add it to the sidebar, and then mail it to a friend

Go to the My Widgets Sidebar Panel, and use the “Panel menu” in the title bar to choose: Configure a Widget from... A Google Gadget
Add any Google Gadget to your Sidebar

A wizard is launched. Choose to browse the Google Gadget directory. Click Finish.
Add any Google Gadget to your Sidebar

Click the Add to Sidebar Button

See that the gadget appears in your sidebar
Add a Notes View to the Sidebar

Simply click the “Add to Sidebar” toolbar button (or the corresponding menu item on the Tools – Widgets menu)
Add a Notes View to the Sidebar

The widget catalog shows up as a sidebar panel, and is removed as a tab.

It does not look that great—more about how to customize it next!
Add Mail to the Sidebar

- You can put any Notes view (or document!) into the sidebar by clicking the “Add to Sidebar” toolbar button

- HOWEVER, the Java views present a problem— they don’t work as sidebar panels. The workaround?
  - Open the “old traditional” view
  - Press CTRL + ALT when you open any of the java views (Mail, Calendar Contacts, To dos, Notebook)

Put focus on Mail in the Open list. Press CTRL + ALT, and then click
Add Mail to the Sidebar

Once the old version of the mail template is open, just click the “Configure a Widget from Current Context...” button.
Add Mail to the sidebar (hide the navigator)

- The *new* Notes configuration dialog appears! You can choose what type of Notes widget to create. For now, let's add the Inbox view.

Select the “Open this view” option

Leave the “Show Navigator” option unchecked to hide the navigator

Click Next to continue.
Add Mail to the sidebar (hide the navigator)

Select “Display as a sidebar panel” and click Finish to create the widget.
Add Mail to the sidebar (hide the navigator)

Your mail sidebar panel appears, and the mail tab along the top is closed.
Amazing Actions
Actions

- Make your widgets come to life
- Add Actions to your Widgets during creation
- Add Actions to Widgets already in your Side-bar
Wire an Action from scratch

- Open the target of your Action, can be:
  - A web-page, or
  - A Notes Database
- Use the 'Configure a Widget from the Current Context' tool
- Follow the prompts
- Use the Action from any Notes document
Wiring: Open the Target

For a website action, enter the website URL in the Address tool-bar.

TIP:
Press Ctrl+L
If the Address tool-bar is not already available.
Wiring: Start the Wizard

Use the 'Configure a Widget from the current context' tool to start the Wizard
Wiring: Choose the type

To Wire an Action to fill in a Form, choose “From a Form”

Choose Next
Wiring: Choose the form to wire

Highlight the form to wire from the list of identified web-forms.

The highlighted form will turn lime-green.

Choose Next.
Wiring: Choose 'Wire as an action'

Give the Widget a Name

Choose 'Wire as an Action'

Choose Next
Wiring: Choose the Recognizer to use

Choose the content to use (Other Content) is an easy option.

Choose 'Text Selection'.

Choose Next.
Wiring: Widget and Action created!

Test and Publish
Test the widget before you publish it.

Click Finish to configure:
A widget named Google Maps

Test the widget. To publish the widget to the Widget catalog, locate the widget in the My Widgets sidebar panel, and then choose the Publish context menu. Users will then see it in the Widget Catalog.
Wiring: Test it out!

Highlight some text (we chose 'selected text' as the recognizer)

Then Right-Click

Choose the Action name from the Right-Click menu!
Wiring: The Result
Two essential Actions!

- Open an email and create an Email action for the 'Memo' form
- Open a Meeting and create a Meeting action for the "Calendar' form.
Sharing Widgets!

- Add widgets to a catalog
- Email widgets to another user
While Notes is more than Mail, you CAN mail a widget to a friend :-) 

Locate the Currency converter thumbnail and right-click to post the context menu

Choose the menu item Email to...

And/or publish to a catalog!
Receive the message and use menus to install

The recipient can install it the same way it's installed from the catalog, or drag the .xml to the My Widgets panel.

Or just drag the attachment to the My Widgets sidebar.
Powerful Plug-ins
Powerful Plug-ins

- Extend your Notes Client with additional Side-Bar applications (Plug-Ins)
- Examples:
  - File navigator (from open NTF)
  - Attachment viewer
Plug-Ins: Installation options

- File-Application-Install (Yucky!)
  - Full instructions on how to enable and use are here:
- Use the Widgets side-bar to browse a plug-in
  - Web site, or
  - catalog
- Drag a plug-in installer to the Widgets side-bar
- **Easiest!** Deploy a Widget Catalog and push down CATEGORIES of widgets automatically!
History

- Where have you been in Lotus Notes?
  - Use short-cuts
    - Alt + ← (go Back)
    - Alt + → (go Forward)
  - OR
  - Get the History Plug-In
    - http://www.openntf.org/Projects/pmt.nsf/ProjectLookup/3D%20History%20Thumbnail%20Viewer
Get Social

- Sidebar Panels for IBM Connections
  - Activites
  - Files
  - Status Updater
- TwitNotes
  - The complete Twitter client for Lotus Notes
Add the Connections plug-ins

- Activities sidebar available as part of the Notes client installation
  - Plus – you can take Activities data offline!
- Others are available from the Lotus Greenhouse catalog
  - Connections Files (Windows/Mac)
  - Status Updater: (Windows, MacOS, Linux)
Get Social: Share Files and Use Activities

Connections Files sharing in Sidebar

Connections Activities – Drag mail to add to activity; also take offline!
Get Social: Microblogging in the Sidebar

Connections
status updates

TwitNotes: twitter client for the Sidebar
Don't forget WildFire!

- IBM Connections
- Twitter
- Facebook
- Linkedin
- SameTime (Status Updates)
- Tumblr
- Wordpress
- And more...
How to install Wildfire

- Go to: http://wildfire.openntf.org
- Drag the 'THIS LINK' to your 'My Widgets' side-bar
- Add your accounts
No Widget, No Plug-in, No Problem
No Widget or Plug-in, No problem

- Many web sites optimised for Mobile use are perfect side-bar applications!
  - m.linkedin.com
  - m.facebook.com
  - m.twitter.com
  - m.dropbox.com
  - m.flickr.com
  - britishairways.com/mobile
  - qantas.com/mobile
  - (see a pattern)
You can wire mobile sites too!

- m.linkedin.com
  - People search
- mobile.wikipedia.org
  - reference search
WOW – That's **Notes**!
Get productive with Lotus Notes!

- Tie it all together, what is possible within Lotus Notes:
  - Know your Notes
  - Super Short-Cuts
  - Bitchin' Bookmarks
  - Sizzlin' Search
  - Wonderful Widgets
  - Amazing Actions
  - Powerful Plug-Ins
  - Get Social
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Questions?
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  - @matnewman on twitter
- Google “Mat Newman”
  - Look for the guy in the Yellow Suit
- Just shout “MAT NEWMAN”!
  - Hugs are always welcome :-)
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