

ID109 IBM Lotus Notes® Hints and Tips

Alan Lepofsky - Lotus Software

<http://www.alanlepofsky.net>

The logo for Lotusphere 2007 features the word "Lotusphere" in a bold, sans-serif font, with the "here" portion enclosed in a black circle. To the right of the circle is the year "2007". The entire logo is set against a bright yellow sunburst background with radiating lines.The IBM logo, consisting of the letters "IBM" in a bold, sans-serif font, with a registered trademark symbol (®) to the right. The letters are white and set against a dark blue background.

Agenda

- General User Experience
- Working With Views
- Content Creation
- Calendar
- Tools

- Q&A

Hints and Tips Blog...

<http://www.alanlepofsky.net>

IBM Lotus Notes Hints, Tips, and Tricks

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January 16th, 2005

About Me

Posted at 07:10:25 PM in [General](#) | (0) | [Permanent Link: About Me](#)

My name is Alan Lepofsky. While I am an [IBM](#) employee, I want to be clear, this is not an official IBM web site. My hope is to share with you some of the knowledge I've gained from a decade of using Notes and Domino.

I started with IBM Canada in 1993 as a university co-op student. The team I joined deployed a Notes based (on OS/2) opportunity management system for sales teams across the country, arguably one of the first deployments of Notes within IBM. After IBM acquired Lotus and Notes became the standard collaboration platform within IBM, I helped architect some of the initial rules for IBM's internal Notes network. Next I moved into a division of IBM Global Services, where I worked on the architecture and deployment of many of IBM Canada's outsourced Domino accounts.

In 2001 I moved from Toronto to Boston to work at Lotus headquarters. My main two duties at that time were helping run a council of IBM's largest Notes/Domino customers, and working on Lotusphere.

While some of my greatest memories come from being part of those Lotusphere keynote teams, I decided to jump into the business side of things, and around the launch of Notes/Domino 6 I began working as the Domino Offerings Manger. My responsibilities there included licensing, pricing, working with product managers and developers on determining features of future versions, etc. Up next, I switched from the business side to marketing, where I was responsible for the internal (for IBM) and external (customers, press, partners, analysts, etc) material created for the family of Notes/Domino.

A General Tour Around The Screen

Welcome - IBM Lotus Notes

File Edit View Create Actions Text Tools Help

Welcome Replication X New Message X New Message X

Click here for Home Page options ▼

Lotus. Notes 8 Beta 1 Search Notes database catalog for Search

Mail New memo

Calendar New entry

Contacts New contact

To Do List New to do

Personal Journal New entry

Tip of the day... To select all documents in a view or all contents in a document, press CTRL+A.

Day Week Month Formatting September 2009

	3 Thursday September 2009	Elul 5769 14 4 Friday September 2009	Elul 5769 15
9 am			
10 am			
11 am			
12 pm			
1 pm			
2 pm			
3 pm			
4 pm			
5 pm			

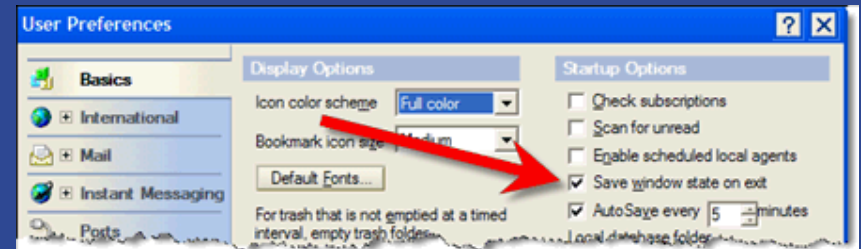
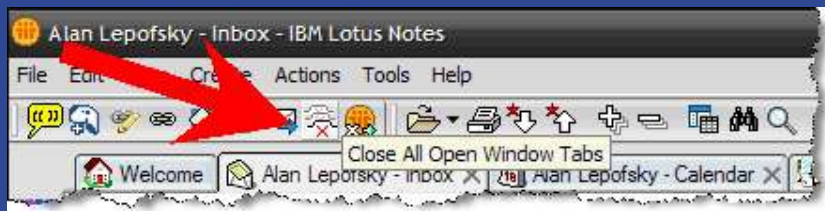
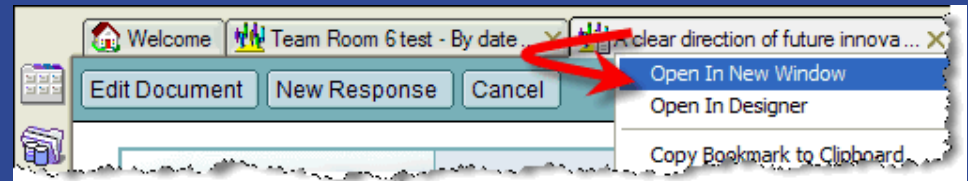
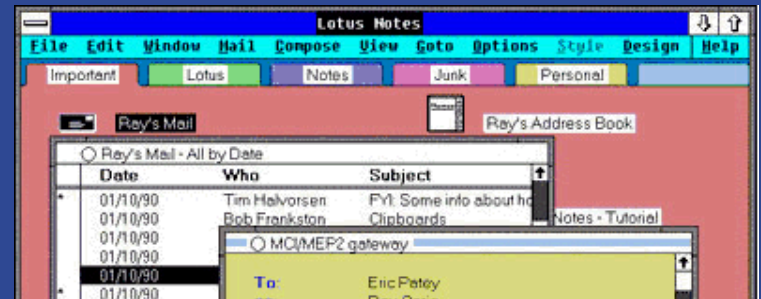
Day 246, 119 days left Day 247, 118 days left

This is the protected text area of the form.

Disconnected 2. Lotus - Lotus ST

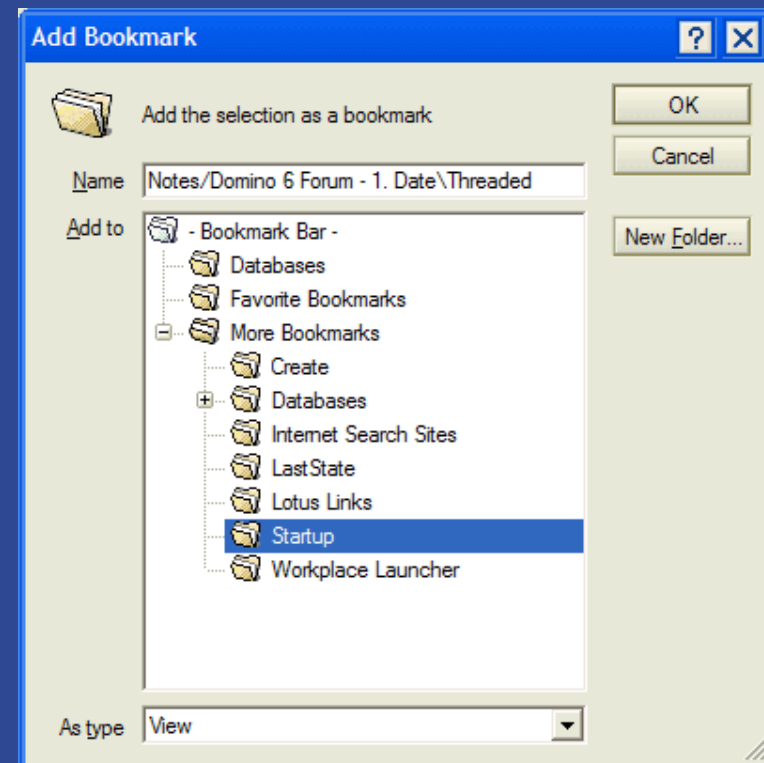
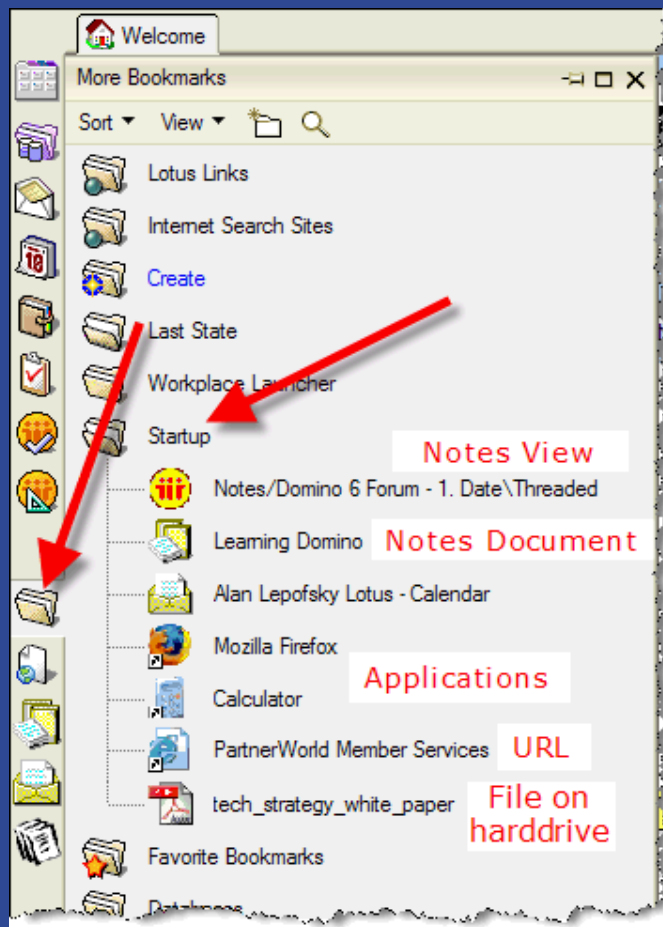
Tabbed Window Interface

- Now every program wants to look like Notes! (IM clients, newsreaders, web browsers)
- Drag and Drop Re-order
- Open In New
- Notes 7 = Close All
- Saved Windows State



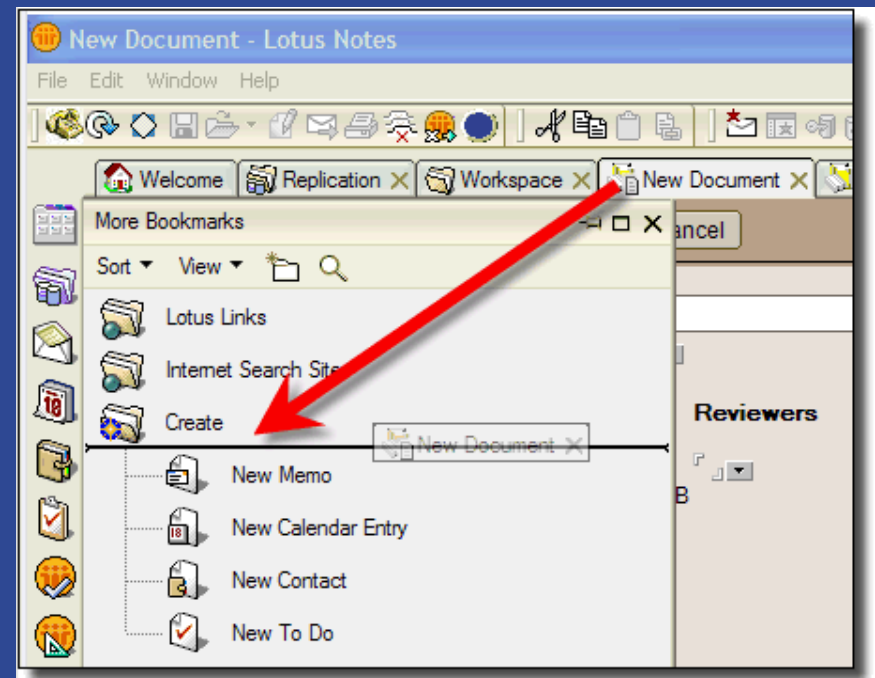
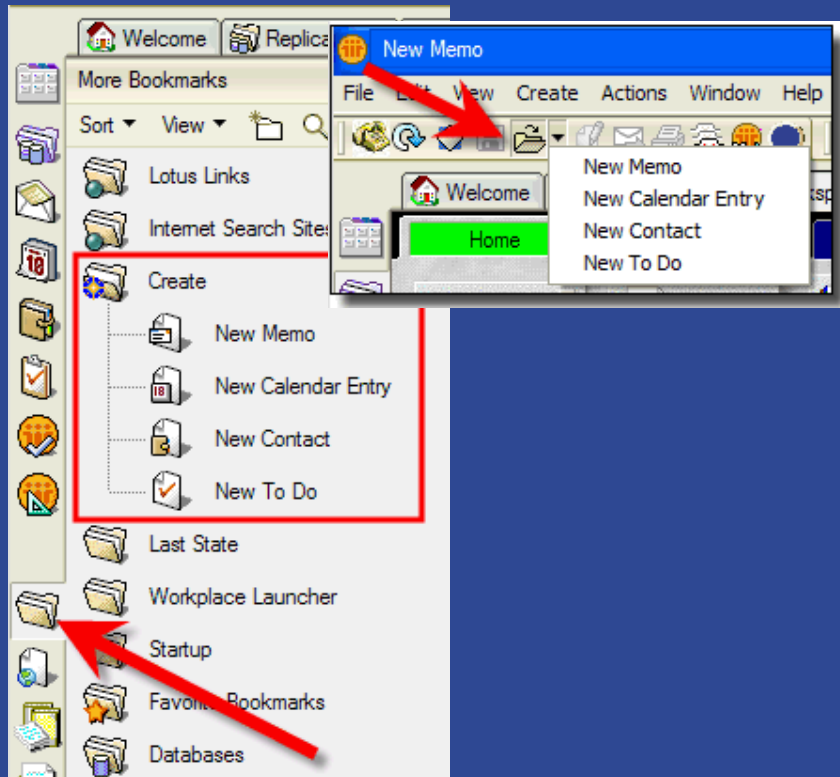
StartUp Folder

- Automatically start databases, links, application, files!



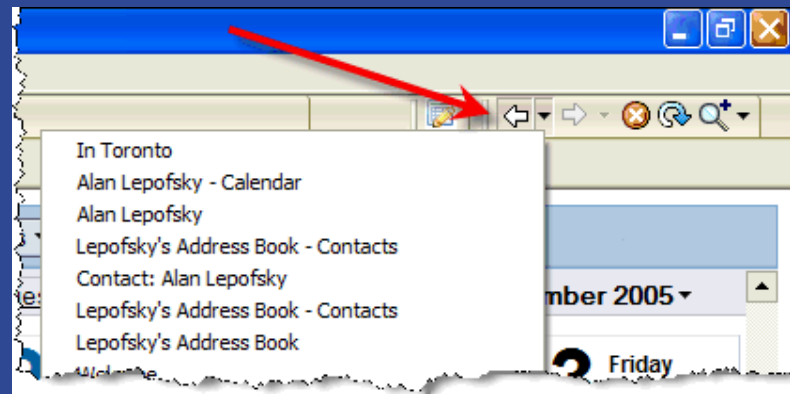
Create New Folder

- Easily create a document from any database



Navigation History

- If you prefer your keyboard to the mouse, you can use ALT+LEFT ARROW to go back, and ALT+RIGHT ARROW to go forward.



Keep Document Context When Switching Views

- Select document, press and hold CTRL, switch views

The screenshot shows the 'Document Library' interface. On the left, a sidebar lists navigation options: 'All Documents Flat' (selected), 'All Documents', 'By Author', 'By Category', and 'My Favorites'. The main area is titled 'Search in View 'All Docs Flat'' and contains a search input field. Below the search field is a table with two columns: 'Date' and 'Topic'. The table contains the following data:

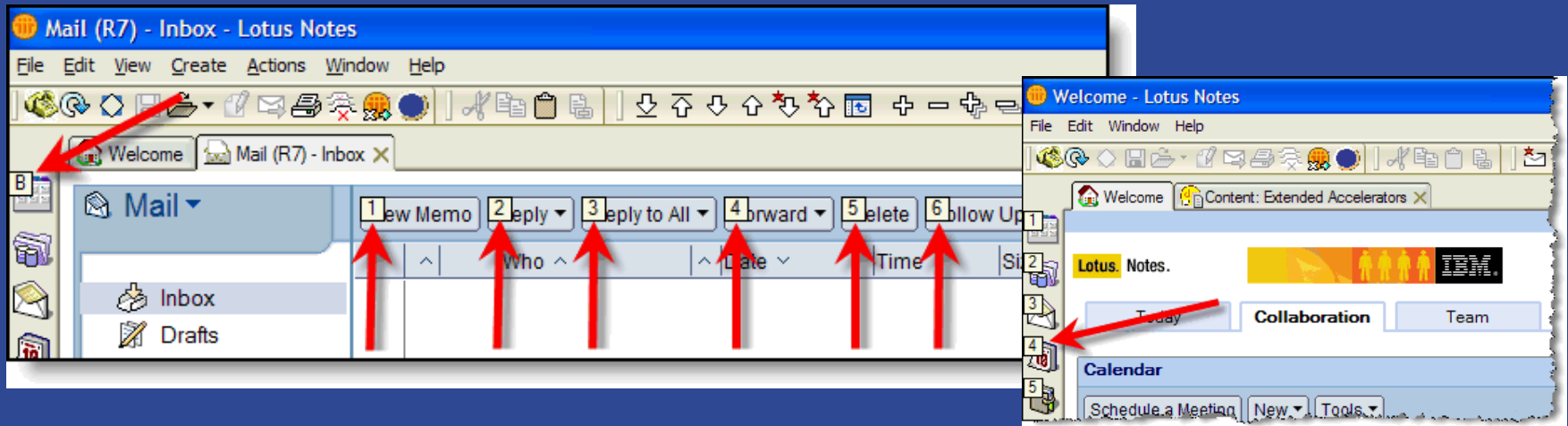
Date	Topic
04/26/2006 12:29 AM	A Listing Of Tagging & Social Bookmark Services
04/26/2006 12:17 AM	InfoPath (Alan Lepofsky)
04/26/2006 12:17 AM	Overview of Features (Alan Lepofsky)
04/24/2006 01:08 PM	Lessons Learned from a Significant WinBack O

The screenshot shows the 'Document Library' interface with the 'By Category' view selected in the sidebar. The main area is titled 'Search in View 'By Category '' and contains a search input field. Below the search field is a table with one column: 'Topic'. The table contains the following data:

Topic
Application Development
InfoPath (Alan Lepofsky 04/26/2006)
Eclipse / SWT (Alan Lepofsky 04/15/2006)

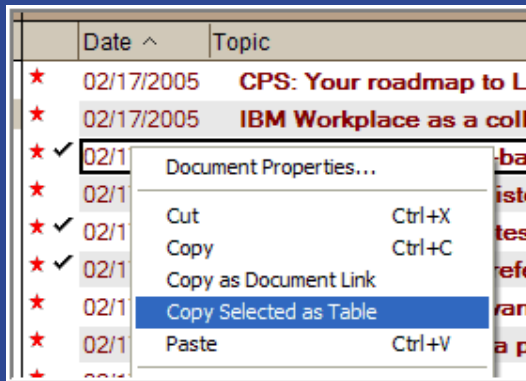
Extended Accelerators

- Press the ALT key, and numbers appear on the Action Buttons in the current document or view
- Press ALT + W, numbers appear over the Windows tabs
- Press ALT + B, numbers appear over the bookmark icons

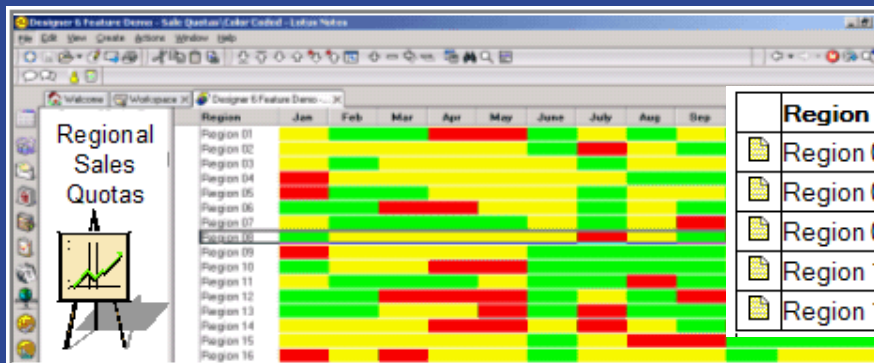


Copy Selected As Table

- Create multiple document links at one time
- Keeps the views formatting



Date	Topic
02/17/2005	Examples of Domino-based Web Sites
02/17/2005	You can purchase Notes/Domino in 3 ways.
02/17/2005	IBM Lotus Notes 6.5 reference card



Region	Jan	Feb	Mar	Apr	May	June	July
Region 05	Red	Green	Green	Yellow	Yellow	Yellow	Green
Region 06	Green	Green	Red	Red	Yellow	Yellow	Green
Region 08	Green	Yellow	Yellow	Yellow	Yellow	Yellow	Red
Region 12	Green	Green	Red	Red	Red	Green	Yellow
Region 14	Yellow	Yellow	Yellow	Red	Red	Yellow	Red

Copy Selected As Table to Spreadsheet

Region	Jan	Feb	Mar	Apr	May	June
Region 01	50.00	100.00	100.00	100.00	74.00	100.00
Region 02	35.78	60.85	99.02	110.90	31.94	114.66
Region 03	49.03	116.92	37.96	88.90	56.08	62.00
Region 04	9.71	73.4	115.22	122.63	97.33	54.20
Region 05	5.11	85.22	98.83	67.00	72.24	57.79
Region 06	124.27	123.77	3.24	101.50	42.39	60.23
Region 07	44.75	77.13	125.13	131.17	117.15	41.25
Region 08	145.7	62.08	27.54	126.79	70.97	73.32

The screenshot shows a spreadsheet application window with the following menu bar: File, Edit, View, Insert, Format, Tools, Data, Window, Help. The toolbar includes icons for file operations, editing, and formatting. The spreadsheet grid shows the data from the previous table pasted into cells A1 through G9. The column headers are A through G, and the row headers are 1 through 9. The data is as follows:

	A	B	C	D	E	F	G
1	Region	Jan	Feb	Mar	Apr	May	June
2	Region 01	50	100	100	100	74	100
3	Region 02	35.78	60.85	99.02	110.9	31.94	114.66
4	Region 03	49.03	116.92	37.96	88.9	56.08	62
5	Region 04	9.71	73.4	115.22	122.63	97.33	54.2
6	Region 05	5.11	85.22	98.83	67	72.24	57.79
7	Region 06	124.27	123.77	3.24	101.5	42.39	60.23
8	Region 07	44.75	77.13	125.13	131.17	117.15	41.25
9	Region 08	145.7	62.08	27.54	126.79	70.97	73.32

Powerful Text Formatting Shortcuts

- Increase/Decrease Font size
 - ▶ Select text, press F2
 - ▶ Select text, press Shift + F2
- Indent/Outdent (paragraph or line)
 - ▶ Select text, press F8 or Select text and press Shift + F8
 - ▶ Select text, press F7 or Select text and press Shift + F7
- Convert to bulleted list, or numbered list
 - ▶ Select text, press Alt + T, then L, then L
 - ▶ Select text, press Alt + T, then L, then N

Rearranging Table Cells or List Items

- CTRL + UP, CTRL + DOWN

The diagram illustrates the process of rearranging table cells and list items using keyboard shortcuts. It shows three examples of table rearrangement and a list of items.

Table Rearrangement Examples:

- Example 1:** A 3x3 table with values 1-9. A red arrow points from cell (1,2) to cell (1,5) in the resulting table.
- Example 2:** A 3x3 table with values 1-9. A red arrow points from cell (2,5) to cell (1,5) in the resulting table.
- Example 3:** A 3x3 table with values 1-9. A red arrow points from cell (3,8) to cell (2,7) in the resulting table.

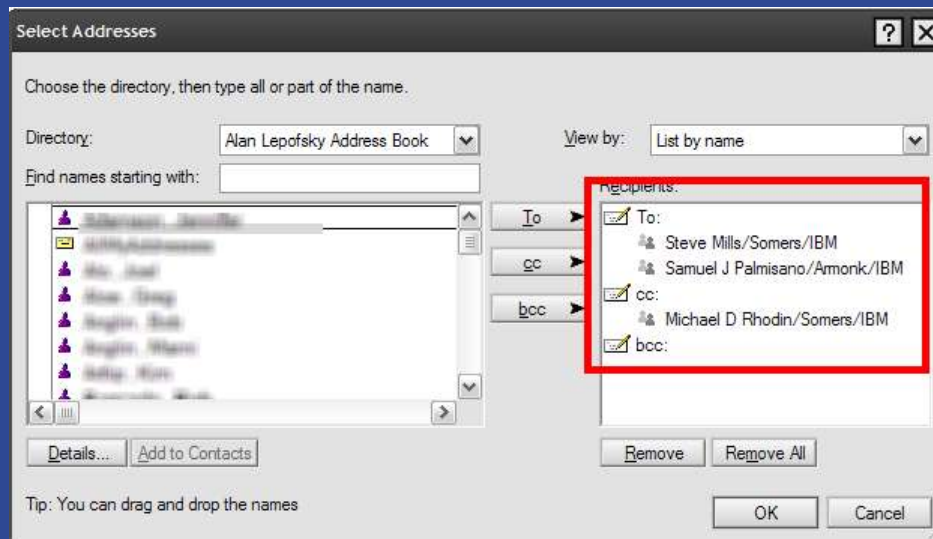
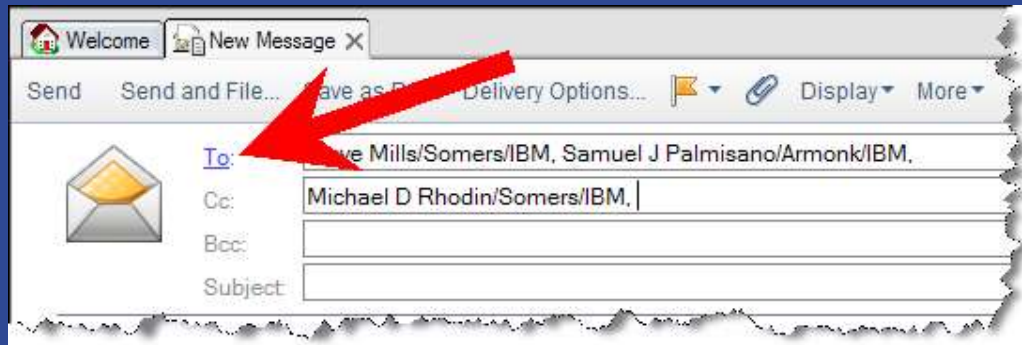
List Item Rearrangement:

A list of items is shown in a table format:

• Ed	• Alan
• Steve	• Ed
• John	• John
• Alan	• Steve

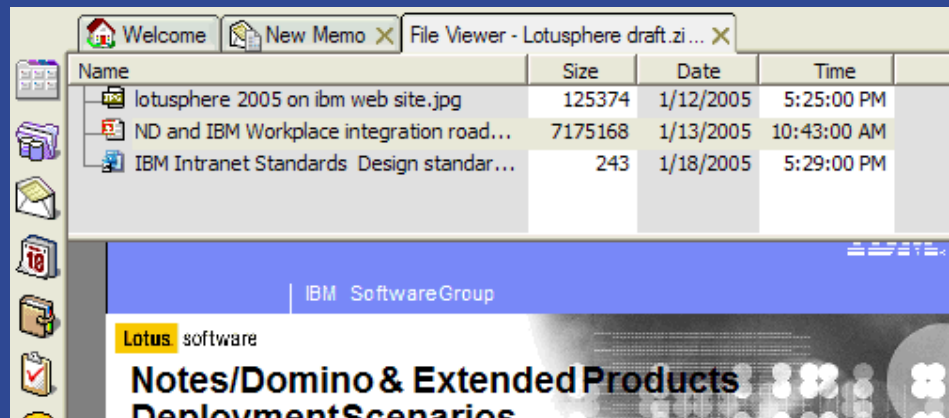
Re-arranging Mail Addresses

- You can't drag and drop in the email itself, but you can in the Address Dialog box.



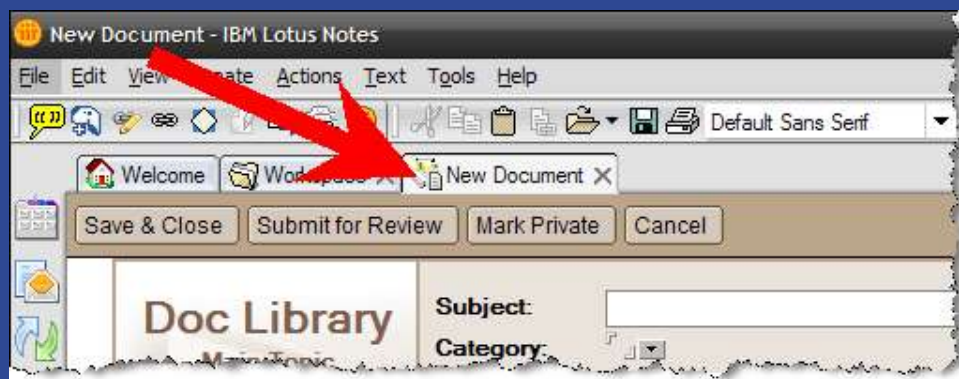
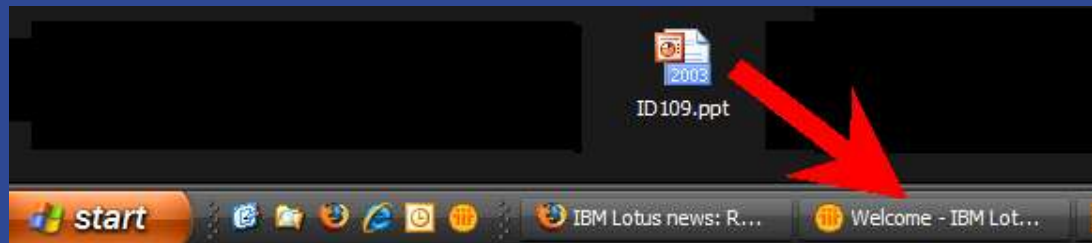
Attachment Viewers

- You don't always have to launch the native application, use "View" instead.
- Magnify
- Rotate
- View and extract zip files!



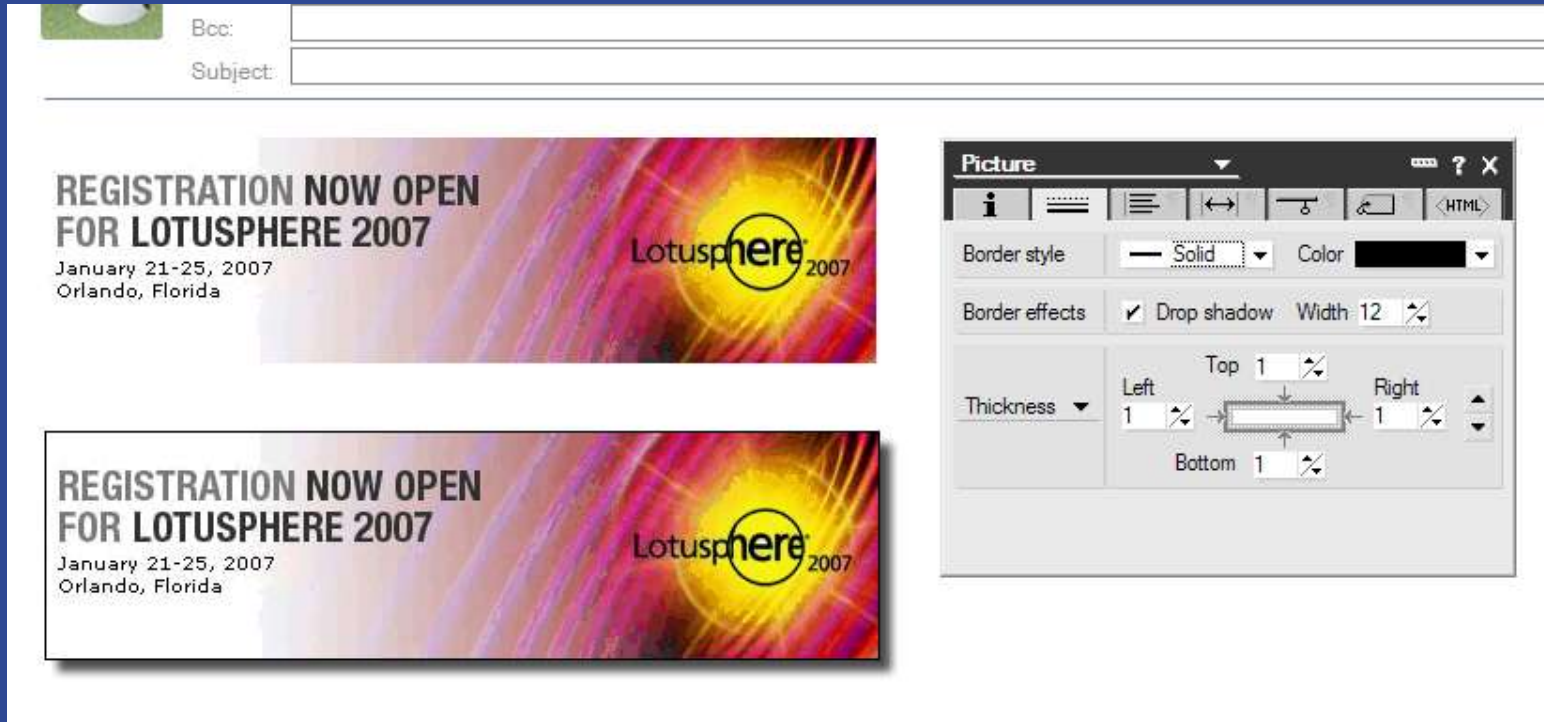
Drag and Drop Attachments

- From Notes to OS, or from OS to Notes
- Step 1: Hover over Windows taskbar buttons to make Notes active.
- Step 2: Within Notes, hover over window tab to make that document active



Picture Properties

- A little formatting can make a document look much better.
- Borders and Drop Shadows
- Links



Bcc: _____
Subject: _____

**REGISTRATION NOW OPEN
FOR LOTUSPHERE 2007**
January 21-25, 2007
Orlando, Florida

**REGISTRATION NOW OPEN
FOR LOTUSPHERE 2007**
January 21-25, 2007
Orlando, Florida

Picture [?] [X]

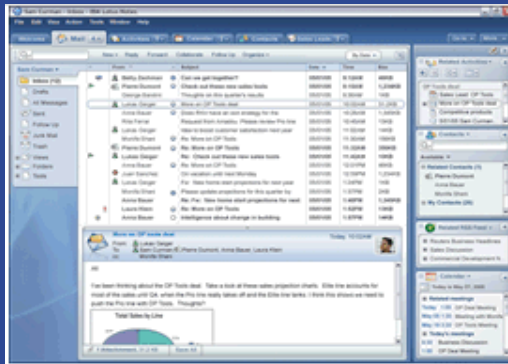
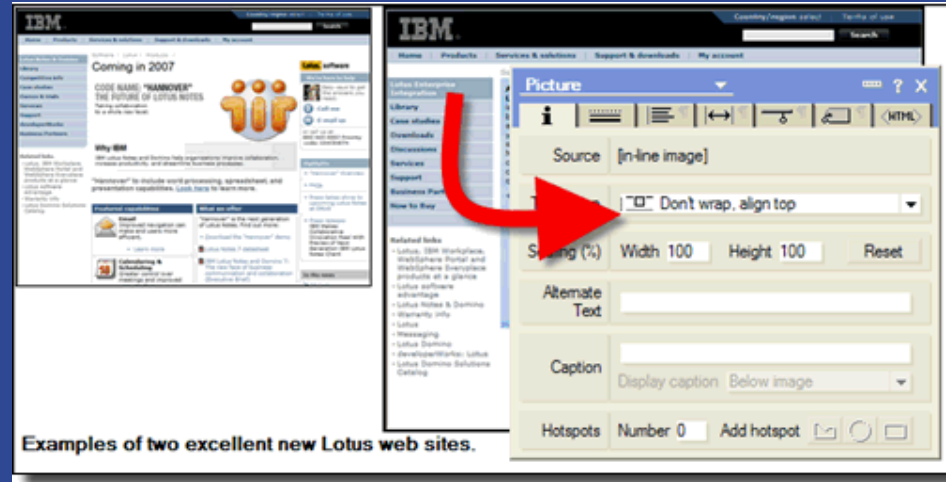
Border style: Solid Color: [Black]

Border effects: Drop shadow Width: 12

Thickness: [1] [Left: 1] [Top: 1] [Right: 1] [Bottom: 1]

Picture Wrap

- Wrap Text
- Align Images



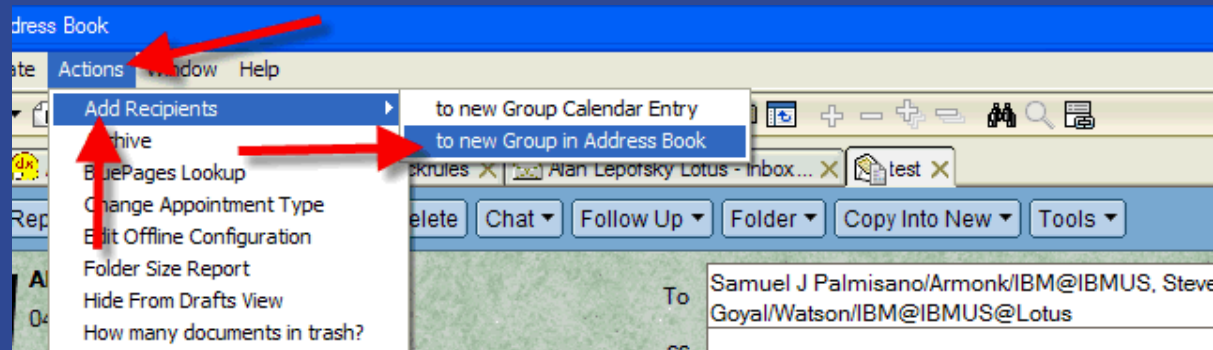
Here is a line of text. Notice it is lined up with the top of the image.
Here is a second line of text.
Here is a third...
and a fourth...

Creating Groups

- Copy Into New Group



- Add Recipients to Group in Address Book



Suggested Meeting Times

- Let Notes find the best time for a meeting.
- Summary vs. Details

The screenshot displays a meeting scheduler interface. At the top, the 'Invitees' section is highlighted with a red arrow. Below it, the 'Scheduler' window is open, showing a list of suggested meeting times for the next 7 days. The window includes a 'Show' sidebar with 'Summary' selected and 'Details' collapsed. A legend at the bottom indicates the status of each time slot: Available (white), Already Scheduled (red), Unavailable (orange), No Info (grey), and Info Restricted (green).

Invitees

Required (to) Ed Brill/Cambridge/IBM@IBMUS, Mary Beth Raven/Westford/IBM@IBMUS, Jeff Eisen/Westford/IBM@Iris, Chris Reckling/Cambridge/IBM

Optional (cc)

FYI (bcc)

Scheduler Select the best time from the list of recommended times. Change the meeting date using the calendar.

▼ Suggested times for next 7 days ▼ Check if at least 75% required can attend

January 8, 2007 - January 14, 2007

When	Required	Optional	Rooms	Resourc
01/10 02:00 PM - 03:00 PM	3 of 4	-	-	-
01/12 01:00 PM - 02:00 PM	3 of 4	-	-	-
01/12 02:00 PM - 03:00 PM	3 of 4	-	-	-
01/12 03:00 PM - 04:00 PM	3 of 4	-	-	-

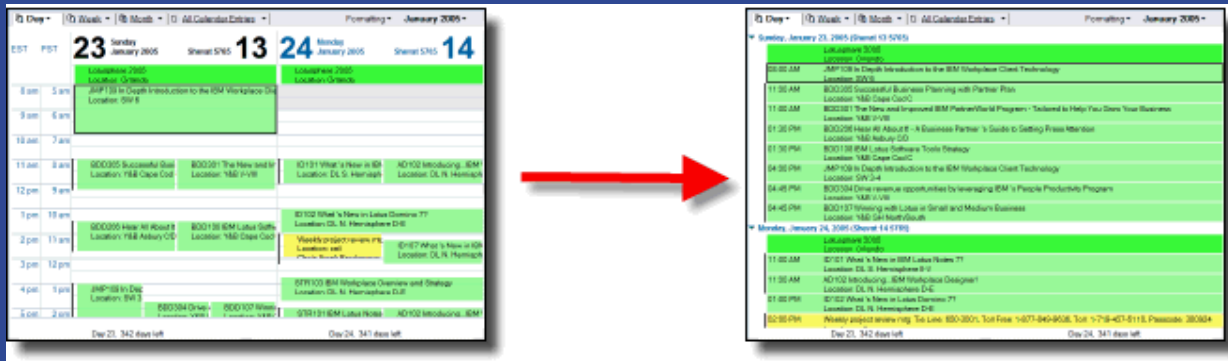
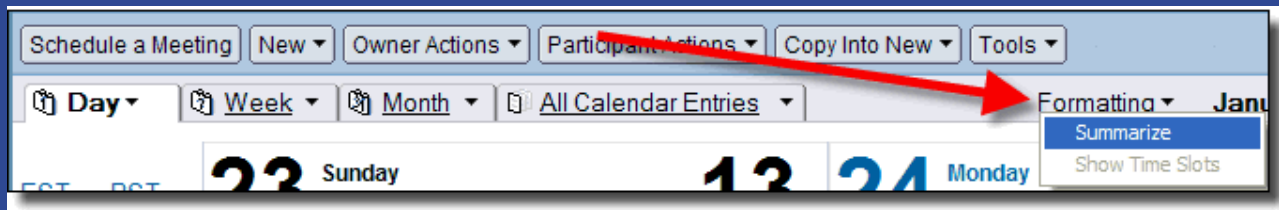
Mo Tu
1 2
8 9
15 16
22 23
29 30

Use Selected Time

Available Already Scheduled Unavailable No Info Info Restricted

Summarize Calendar

- Remove the "white space gaps" and just show meeting agendas



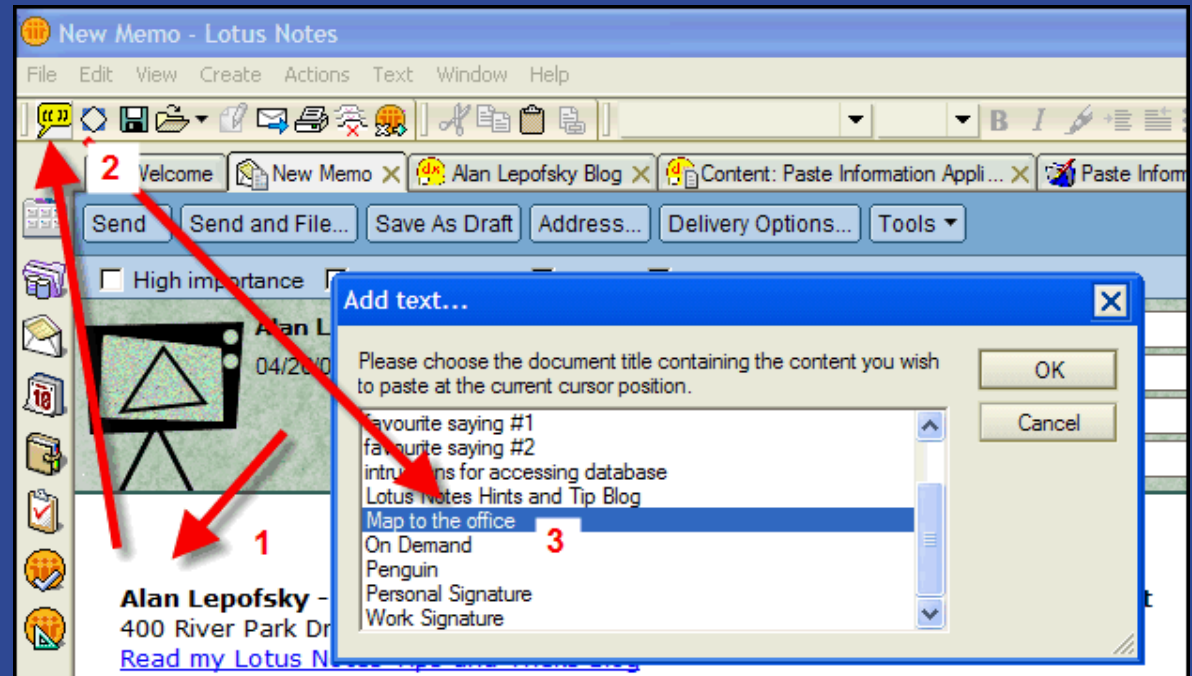
Print Calendar To Document

The screenshot shows the Lotus software interface. On the left, a calendar for January 2007 is displayed, with the date January 5, 2007, highlighted. A red box highlights the 'Print' button in the top right corner of the calendar window. In the foreground, a 'Print Calendar' dialog box is open, showing the printer selection process. The dialog box has a 'Printer' tab and a list of printers. The 'Name' field is set to 'Canon S800', and the 'Status' is 'Ready'. A red arrow points from the 'Print' button in the calendar window to the 'Print' button in the dialog box. Below the dialog box, the main calendar window is visible, showing a grid of dates for January 1 - January 7, 2007, and a section for 'Monday, January 1, 2007' with events like '- Anniversary -' and 'New Year's Day (USA)'. The top of the window shows tabs for 'Welcome', 'Workspace', 'Alan Lepofsky - Calendar', and 'Alan Lepofsky'.

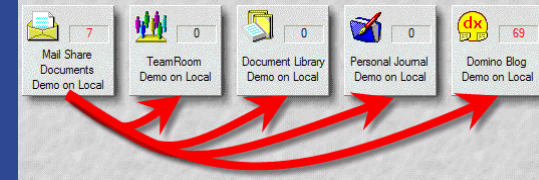
Tools

Content Paste

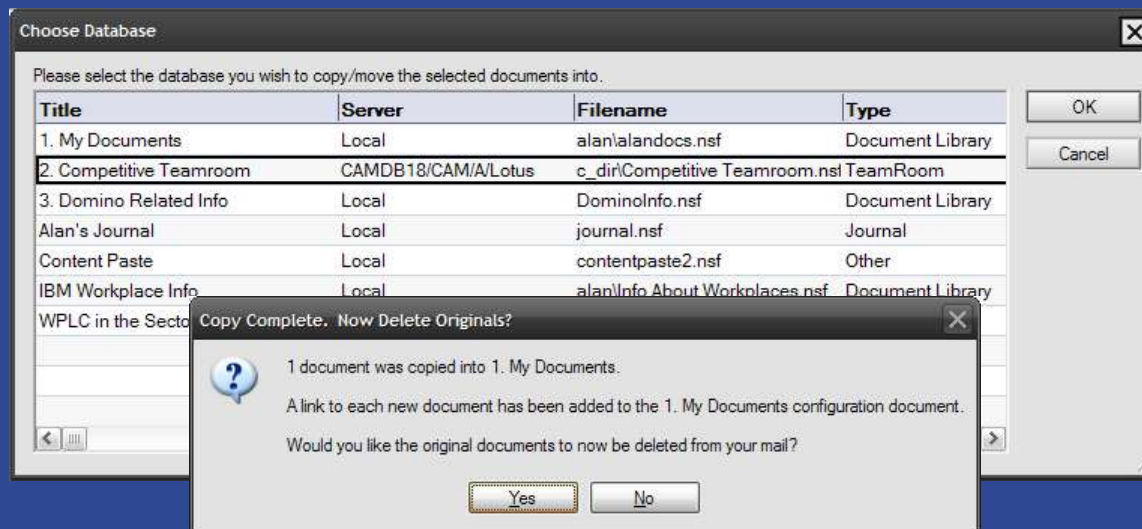
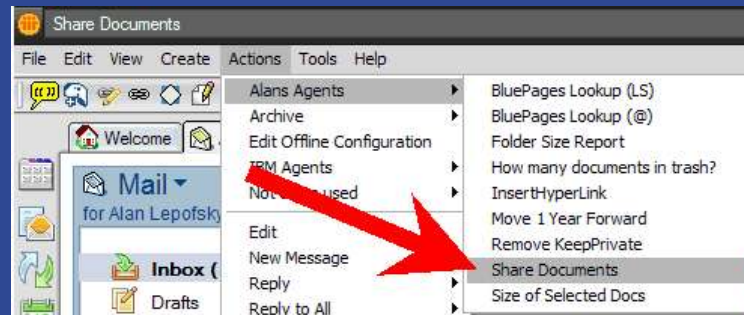
- Do you have bits of information that you reuse over and over again?
 - ▶ Signature Files
 - ▶ Maps
 - ▶ Images
 - ▶ Tables
 - ▶ Links
 - ▶ Programming Code



Share Documents

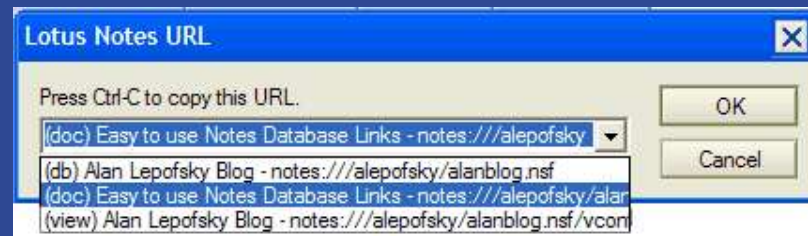
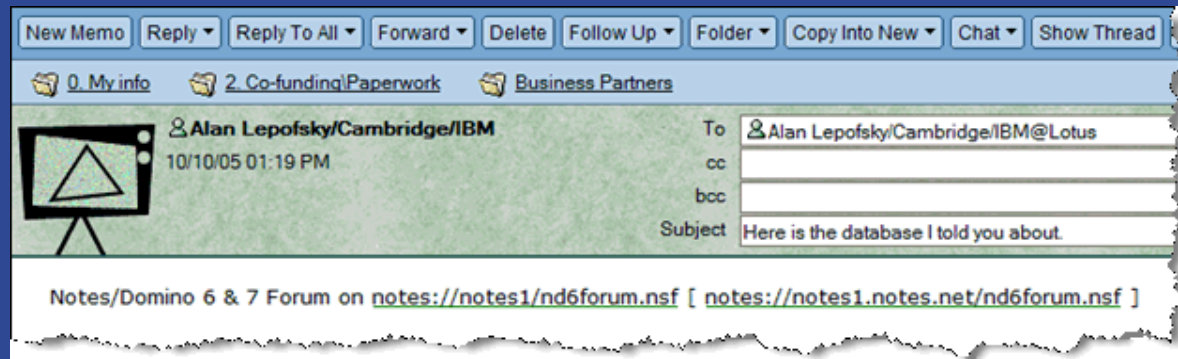


- Have you ever wanted to easily copy or move information from your mail file to a TeamRoom, Document Library, Personal Journal, or any other database?



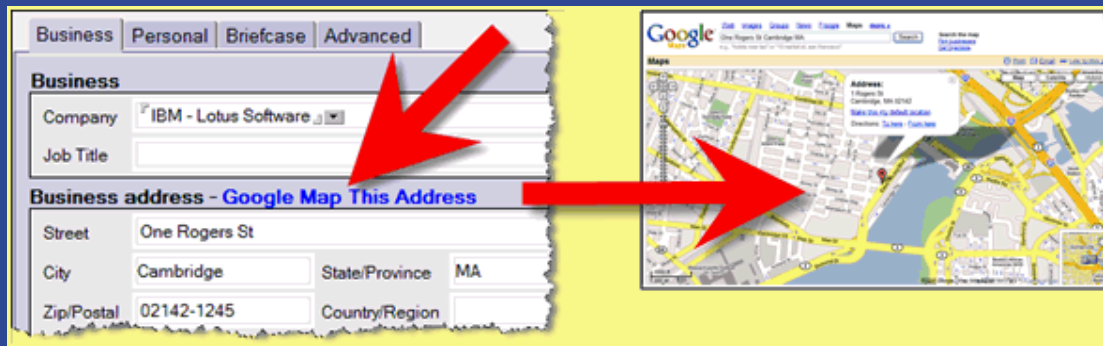
Linker

- More "URL-link" database, document, or view links.



Map Address

- Have you ever wanted to generate a map to one of the contacts in your Personal Address Book?



Resources on alanlepofsky.net

- Many more tips. Look in the archives by Category or by Month.
- RSS Feeds for new entries as for comments
- What are Notes and Domino? Simple explanations and overview of general concepts.
- Notes/Domino Product Catalog
- Notes/Domino Administration Tools and Resources
- Notes/Domino Application Developer Tools and Resources
- Notes/Domino 7 Articles, Demos, ...
- Links to useful Domino sites
-

Questions and (hopefully) Answers



Some Places To Visit

- www.alanlepofsky.net
- www.edbrill.com
- www.dominoblog.com
- www.adamgartenberg.com
- www.lotus.com/ldd/dwteamblog.nsf
- www.ibm.com/developerworks/blogs/page/InsideLotus
- www.ibm.com/developerworks/blogs/page/marybeth
- www.openntf.org
- www.lotususergroup.org
- www.secondlife.com

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