Navigating Documents

From a view

Enter / Double Click	Open document
Ctrl + E	Open document in edit mode

When a document is open in read mode

Enter	Next document
Backspace	Previous document
Double click / Ctrl + E	Edit document
Esc / Double Right-Click	Close document

(Double right-click is enabled in File > Preferences > Basic Notes Client Configuration > Additional options)

Not Just Notes...

Want to share a document with a colleague? Select **Edit > Copy As > Document Link** and paste into an email.

NB The recipient will get an error if they do not have access to the document.

You can also drag and drop a document from a view to the desktop or a folder. It will create a shortcut to the relevant document. But make sure the document doesn't get deleted or archived, or the link will fail.

Rich Text

Some fields allow you to format the content and insert tables, hyperlinks, attachments and pictures. These are known as **Rich Text** fields. When you are in these fields the toolbar buttons below will be activated.

Fonts and sizes can be changed. F2 will increase the font size, Shift + F2 will decrease it. The usual shortcut keys for copying, pasting, cutting text can be used. In addition Ctrl + Shift + V pastes as plain text and Ctrl + Alt + V performs paste special. Bullets and numbering can be applied. Three different coloured highlighters are also available. Ctrl + K or Alt + Enter will bring up the **Text Properties** box, to quickly set all font settings. Use the **Create** menu to add tables, sections, hyperlinks, horizontal rules, page breaks or pictures.

If you want to set up a personalised font style, you can do this with the permanent pen. Style your text, then highlight it and choose **Text > Permanent Pen > Set as Permanent Pen**. Now, whenever you want to use that styling in a Rich Text field, just click the Permanent Pen button or choose Text > Permanent Pen > Use Permanent Pen.

Rich Text fields are a great place to use menu shortcuts. As in other programs Alt will underline the relevant shortcut key.

Free IBM Applications

With Notes, IBM package personal address book, personal journal, document library, discussion and teamroom database. The last three can be used on mobile devices.

Beyond Basic Tabs

By default applications and each document opens in a new tab. Sometimes that is not what you want.

You can right-click any application, view or document and choose **Open in New Window** to 'detach' it. You can then drag it to a second screen or rearrange multiple panes. Or the **Windows and Themes** tab in Preferences lets you change the default behaviour.

Remember that tabs can be reordered by dragging and dropping. And the keyboard shortcut Ctrl + F8 brings up a popup menu to allow you switch to another tab.

Useful Resources and Acknowledgments

Notes Tips podcast – mail, applications and more	http://www-10.lotus.com/ldd/notestipsblog.nsf
Experience Lotus Notes	http//learn.lotus.com/notes/
Learn IBM Collaboration Solutions videos	http://www-10.lotus.com/mmup/index.html
Learning widget for Lotus Notes (mainly email-related) for-ibm-lotus-notes	http://www-10.lotus.com/ldd/dominowiki.nsf/dx/learning-plug-in-

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IBM Notes Social Edition 9.0 Beta Cheat Sheet v1.0

intec

Created by Paul Withers
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Navigating Notes

Use the Open menu to open any application. Start typing into the box to filter the list. Right-click to dock the open list.

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Home Page	A customisable landing page with configurable layout. You can not only add email and calendaring, but one or more applications, web pages, file system folders and more
Workspace	The familiar Notes workspace of tabs of chicklets for all your applications
Discover	Have a question on how to do something? The new Discover page may help. There's a What's New tab with information and videos; a specific tab for new users; hints and tips if you use Mail and calendaring; and quick links to frequent actions, recent applications, other resources and tip of the day.
Ctrl + Shift + T	Show all tabs as thumbnails
Alt + Left	Back (like in a browser). This does not work in all contexts.
Alt + Right	Forward (like in a browser). This does not work in all contexts.
Ctrl + Break	Cancel the current operation. **NB** Some code may already have run, affecting documents and data.
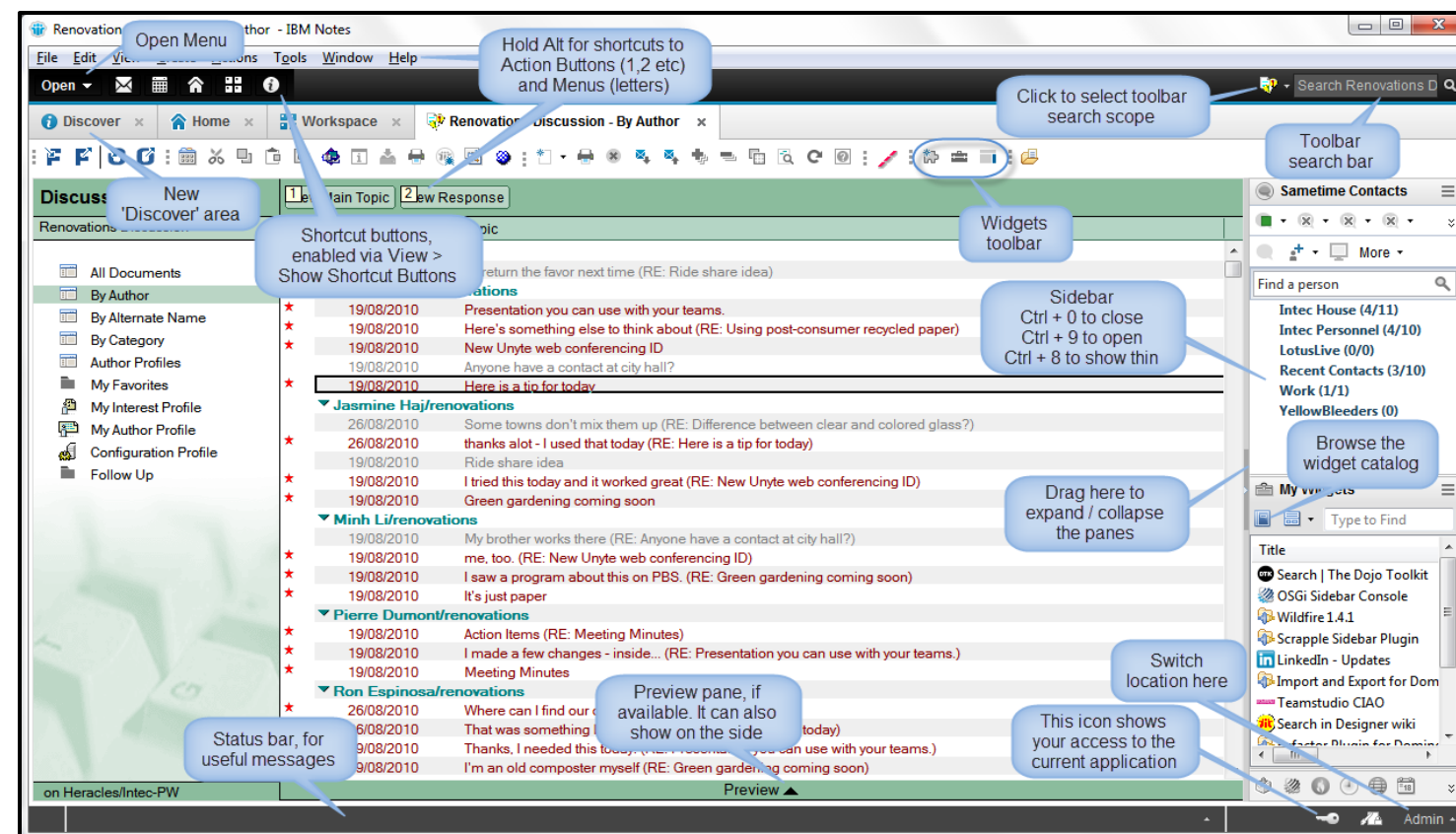
Search *Your* Way

The Banner Search Bar has preconfigured searches, but maybe you regularly search one of your applications.

IBM Notes lets you configure the search. Open a view in an application and Notes adds the application as a search context. It has an "Always Show in Search List…" option to pin that context to the search bar.

Now you can search an application from wherever you are in Notes.

Widgets and LiveText

Widgets and LiveText add power to the IBM Notes Client.

Widgets allow quick access to application or website data from the sidebar.

LiveText recognises searches for recognisable content in documents, adding a dotted underline to allow you to right-click and perform actions.

For information on both, see the Help documentation.

Navigating Categories

+	Expand all categories
Numpad Add	Expand current category
_	Collapse all categories
- / Numpad minus	Collapse current category
Numpad *	Expand current category and descendants

Navigating Views

Home	Jump to first row
End	Jump to last row
F4	Next unread document
Shift + F4	Previous unread document
F3	Next selected document
Shift + F3	Previous unread document

Searching a View – IBM Notes Unleashed

View searches offer real power to IBM Notes applications. If the database has a Full Text Index the search will look for the search criteria in any field in any document in the view. If attachments are indexed as well, the search will look for the search criteria in any attachment as well.

Searches can be made more specific by setting conditions based on dates, authors, field values or by filling out an example form. The example form means you do not need to know field names, but the application developer should be able to confirm key searchable fields.

If you have enough access, you will be able to save searches for future re-use.

Out-of-the-box the maximum results are 5000 documents, but that number may be refined, either by the Domino Administrator or by clicking on **Max results…**.

Results are sorted by default on relevance. The darker the bar, the better the relevance. From the drop-down, that search results order can be changed.

Click on this row and press NumPad * to expand this category and all descendants

Shift + F3

Shift + F4

F4

F3

Click to jump to this position in the view

Click here to select / deselect documents

Unread document

Click and drag to scroll

Search bar

Predefined search wizards

Sort results in different ways

More

Fill out an example form for targeted matching

Expand for additional options

Note: Index may not include recently amended documents

Searches can be saved, if you have been granted access

If 'Create Index' button is greyed out, speak to your Domino Administrator

Switching Views

Are you having trouble finding a document in another view?

Highlight the document in one view, hold down Ctrl and open the second view.

If the document is in the second view, it will be highlighted again. If necessary, press F5 or F9 to refresh the view

Customising Views

Do you regularly find yourself scrolling across a view to see contents of a column that's not immediately visible?

Some views may be configurable, allowing you to drag and drop to reorder columns. If this functionality will really help you, speak to your developer, because it's not enabled automatically.

The database which contains this view is not indexed for searching. Advanced search features are not available, and performance will be slower than usual. If you have proper access, you may create an index for this database.

Need Help with Searching?

If you need help building a search, go to **Help > Search** and search for the page titled **How can I refine a search query using operators**.

This gives all the information required to maximise searches, whether using web query syntax or Notes query syntax.

To set the syntax option, go to **File > Preferences**, go to the Basic Notes Client Configuration tab, and in the Additional Options box locate **Use Notes (not Web) query syntax in the view search bar**.

By default, web query syntax rules are used for simple searching

Simple Searching

If it has not been specifically requested, a Full Text Index may not have been created, so you may see the message above.

You can still search, but won't have the advanced searching capabilities such as specific fields and searching attachments.

If you have access, you will be able to create an index by expanding **More…**.

If not, speak to your Domino Administrator to request a Full Text Index. If the database has attachments and you need to search the content of them, specifically request to **Index attached files**.

Sortable column

Partial matches by default

Select category, another re-sortable column, or 'Any Column'

Extended options, enabled for 'Any Column'

Start typing or press Ctrl + F to open Find box

Exporting Made Easy – Edit > Copy As > Table

Want to export your search results? From any view you can copy selected view contents as a table to paste into an email, Microsoft Word or Excel or other program. Just select one or more documents, and go to **Edit > Copy As > Table**. Then paste as you would normally.