

IBM Lotus Notes Basic Client Cheat Sheet v1.0



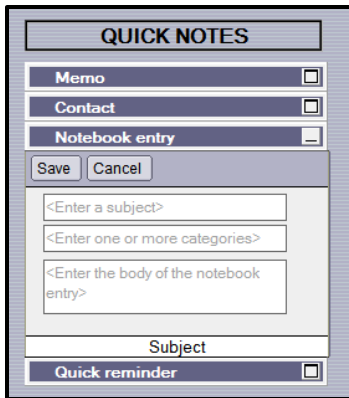
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Updated Dec 2012

Navigating Notes

Use the Open menu to get to all applications. There is a box to start typing in to filter the list.

- Bookmarks The left-hand side of the Notes Client gives quick access to common applications. To add an icon to the bookmark bar, just drag an open tab across to the bookmark bar.
- Workspace The familiar Notes workspace of tabs of chicklets for all your applications
- Ctrl + Tab Cycle through open tabs
- Alt + Home Return to Home Page
- Ctrl + Break Cancel the current operation. **NB** Some code may already have run, affecting documents and data.

Do you want to see a specific set of tabs each time you open Lotus Notes? Then open then and choose **File > Save Window State**.



Quick Notes

The sidebar gives access to quick notes, for quickly adding memos (emails), contacts, notebook entries and reminders. You don't have access to add rich text content, but this area is only intended to quickly perform regular tasks.

Just expand the relevant section, fill in the fields and click Save. Additional information appears at the bottom of the relevant section.

When you're finished with the Quick Notes, just close the sidebar to get your full screen back.

Hold Alt for shortcuts to Action Buttons (1, 2 etc), tabs (W), bookmarks(B) and Menus (letters)

Click to close a tab, or press Esc to close the current tab

Preview pane, if available. It can also show on the side

Switch location here

Status bar, for useful messages

Bookmarks bar

Discussion

Renovations Discussion

Search in View 'By Author'

Search for

Search Search tips More

Not indexed

1 New Main Topic 2 New Response

▼ Frank Adams/renovations

- ★ 08/19/2010 Presentation you can use with your teams.
- ★ 08/19/2010 Here's something else to think about (RE: Using post-consumer recycled paper)
- ★ 08/19/2010 New Unyte web conferencing ID
- ★ 08/19/2010 Anyone have a contact at city hall?
- ★ 08/19/2010 Here is a tip for today

▼ Jasmine Haj/renovations

- ★ 08/26/2010 Some towns don't mix them up (RE: Difference between clear and colored glass?)
- ★ 08/26/2010 Here is a tip for today
- ★ 08/19/2010
- ★ 08/19/2010 at (RE: New Unyte web conferencing)
- ★ 08/19/2010 Green gardening.com

▼ Minh Li/renovations

- ★ 08/19/2010 My brother works there (RE: Any)
- ★ 08/19/2010 me, too. (RE: New Unyte web conferencing)
- ★ 08/19/2010 I saw a program about this on TV

on Telamon/intec...wpx

Preview

Admin

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 selected document

Some towns don't mix them up (Jasmine Haj 26/08/2010)

- Government
- Ideas
 - 1 Ride share
- Meetings
 - 3 Meeting Minutes (Pierre Dumont) **Shift + F4**
 - Action Items (Pierre Dumont 19/08/2010)
 - Addendum to minutes (Samantha Daryn 19/08/2010)
- Paper
 - 2 It's just paper (Minh Li) **F4**
 - if you can rip it, you can recycle it (Ron Espinosa 19/08/2010)
 - Don't f... (Samantha Daryn 19/08/2010)
 - 2 Using post-c... (Samantha Daryn)
 - Here's... (Frank Adams 19/08/2010)
 - found a supplier we could check out. (Simone Dray 26/08/2010)
- Recycling
 - Resources on Global Recycling Program (Ron Espinosa)
 - 1 Where can I find our company recycling policy (Ron Espinosa)
 - It's on the intranet in draft form... (Simone Dray 26/08/2010)

Callouts:

- Click on this row and press NumPad * to expand this category and all descendants
- Shift + F3
- Click to jump to this position in the view
- Click here to select / deselect documents
- Unread document
- Click and drag to scroll

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.

Date ^ Sortable column

Partial matches

Starts with... Search text: fr Search Within Category Search All Cancel

Find Find Options... Match: Case sensitive Accent sensitive Whole words Direction: Forward Wrap at start/end Find Next Close

Start typing to open 'Starts with...' box

Ctrl + F to search for content in any column

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.

The screenshot shows the 'Search in View' interface for a view named 'By Author'. The search bar contains 'Samantha Daryn'. Below the search bar are options for conditions (Date, Author, Field, Form, Multiple words) and a 'Fill out example form' button. The 'Options' section includes checkboxes for 'Use word variants', 'Fuzzy search', and 'Search in results'. The 'Sort results by' dropdown is set to 'relevance'. A 'Note' indicates that the index may not include recently amended documents. A 'More' button is visible in the top right corner. Callouts point to various features: 'Search bar', 'Predefined search wizards', 'Expand for additional options', 'Sort results in different ways', 'Fill out an example form for targeted matching', 'Searches can be saved, if you have been granted access', and 'If 'Create Index' button is greyed out, speak to your Domino Administrator'.

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.

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**.

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

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.

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. 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 application. You can create any of these as a local application. Your Domino Administrator will have access to create a copy on a server, for collaboration with your team.

The design is included, so modifications can be made to the applications for your specific requirements.

Prefer a Browser?

IBM Notes Social Edition brings the power of the basic client to a browser. The IBM Notes Browser Plugin is supported on Windows for Firefox 8 and above or Internet Explorer 8 and above. Links to applications are available in your Favourites (Internet Explorer) or Bookmarks (Firefox). You also have access to the Workspace.

The plugin does not support mail. The expectation is that iNotes will be used for mail access via a browser.

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 center for Lotus Notes (mainly email-related)	http://www.ibm.com/developerworks/lotus/learn
Notes website	http://www.ibm.com/lotus/nd8

Some content may relate to more recent version of Notes.

Thanks to Tim Malone, Duncan Cooper, Dave Leedy, Joyce Davis, Mat Newman & Amanda Bauman

