

THE VIEW Administration Conference for Lotus Software Professionals

ADMIN2010

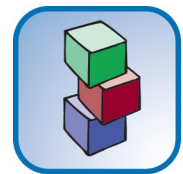
Giving Your Users the Complete Smart Upgrade Experience

**Jess Stratton
Solace**

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What Is an “Experience”?

- An experience is an entire process of an event or happening, from start to finish
 - ◊ In this case, a Lotus Notes client upgrade
- This session is all about the users (not you!), and how to give them (not you!) the best possible upgrade from the moment they find out they are going to be upgraded to when they start using the new product.
- Lotus Smart Upgrade **WORKS**.
 - ◊ This session will take you through setting it up!



**Building
Blocks**

What We'll Cover ...

- **Communicating with your users**
- **Showing them features they'll love**
- **Customizing the Smart Upgrade install for your environment**
- **Training your users like a pro!**
- **DEMO!**
- **Wrap-up**

Before the Upgrade

- **OK, you've decided to upgrade your servers and clients to the latest release of Notes and Domino (or to a higher release on your way to the latest one)**
 - ♦ **Lots of sites are upgrading from 6.5.4 to 8.5.2**
 - ♦ **Some sites like to use incremental upgrades.**
 - ♦ **There's no right or wrong answer**
- **You'll upgrade your servers first, but what comes next?**
 - ♦ **The clients – it's time for change**



**Decision
Point**

Before the Upgrade (cont.)

- **The difference between upgrading a server and a client:**
 - ◊ **The server won't talk back (except on the console, maybe)**
- **The moral of the story — You need the help and full cooperation of your users**
 - ◊ **If you make it easy and fun, and if they look forward to the change, it will just happen**
 - ◊ **Most users are fine with change as long as it's change for the better**
 - ◊ **Remember, all they want is to get their stuff done**

The Four Most Important Emails to Send Your Users

1. “Hey, FYI, an upgrade is coming!”

- ◆ No need for details
- ◆ Send this once the decision is made to upgrade the organization



2. “Here’s why you’ll love this particular upgrade!”

- ◆ Highlights of new features, old features they aren’t using, and bug fixes they’ll appreciate
- ◆ Send this close to upgrade time

The Four Most Important Emails to Send Your Users (cont.)

3. “Here’s what we expect from you.”

- ♦ Screenshots, how long it will take,* what to do
- ♦ Send this right before the upgrade

4. “Here’s where you can go if you are stuck.”

- ♦ Help lines, training session details, links to Web sites
- ♦ Send immediately post-upgrade



Secret

* Always tell users how long something is going to take when you need their help to do something interactive

Words and Phrases You Should Never Say to Users

- **Scalability, reliability**
 - Pretty much anything that ends in “-ability”!
- **Enterprise, Domino**
- **ROI, solution**
- **Deploy**
- **Robust**
- **Integrated**
- **You’ll be able to work smarter, not harder**
- **Desktop client machine**



Heads-Up

Words and Phrases You Should Always Say to Users!

- **How you doin'?**
 - **Small talk goes a long way!**
- **Do you have any questions?**
- **What's the one thing you wish Notes could do for you?**
 - **Most often, it's something it already does!**
- **Better**
- **Faster**
- **Easier**
- **Computer**



Lesson

Constructing the Emails — Know Your Users

- **Are they:**
 - ♦ Open to change?
 - ♦ Fearful of change?
 - ♦ Resourceful?
 - ♦ Do they click on things when you tell them not to?
 - ▶ **Do they not click on what you ask them to?**
 - ♦ Who are your helpers? Your antagonists?
 - ▶ **Naysayers and the influential happy folk can rally an organization either way**
 - ▶ **Talk to them first personally**
 - *Give them a guided tour of the new features*



Checklist

Constructing the Emails — Know Your Users (cont.)

- Does your organization send out IT notices through a generic email account?
 - ◊ Use this if it works and your users respond to it
 - ◊ Otherwise, it's more personal coming from you
 - ◊ Be sure to use a helpful subject line



**Don't
Forget**

Always put a phone number and a statement where to go for more information

#1 Email Example — “Hey, FYI, an Upgrade Is Coming!”

Dear user,

As you may or may not know, your IT department has been working hard to make things easier for you!

In the near future (though not quite yet), we’ll be upgrading your computer to the most current version of Lotus Notes. And we’ll be doing it in a way that we won’t even have to come near your computer.

What does this mean for me?

It will mean about ten minutes of your time (we’ll let you know when) and you’ll have all the latest features.

What can I expect during the process?

Don’t worry – you don’t have to do anything just yet. You’ll get an email with some cool new features of Lotus Notes 8 so that you can get excited about it!

You can then expect a future email with instructions.

Finally, when it’s all done, you’ll get one more email just to make sure you don’t have any more questions.

#1 Email Example — “Hey, FYI, an Upgrade Is Coming!” (cont.)

Is there anything I can do to help?

YES! (And we're so glad you asked!)

Please be sure to read all correspondence we send to you and follow any instructions accordingly and promptly.

We look forward to giving you the latest and greatest for your computer. With your help, this project will be nothing short of a huge success!

Be on the lookout for the next email. Please don't hesitate to email jstratton@solacelearning.com or call 123-555-1234.

Sincerely,

Jess Stratton

The IT Department

What We'll Cover ...

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Where to Find New Release Features

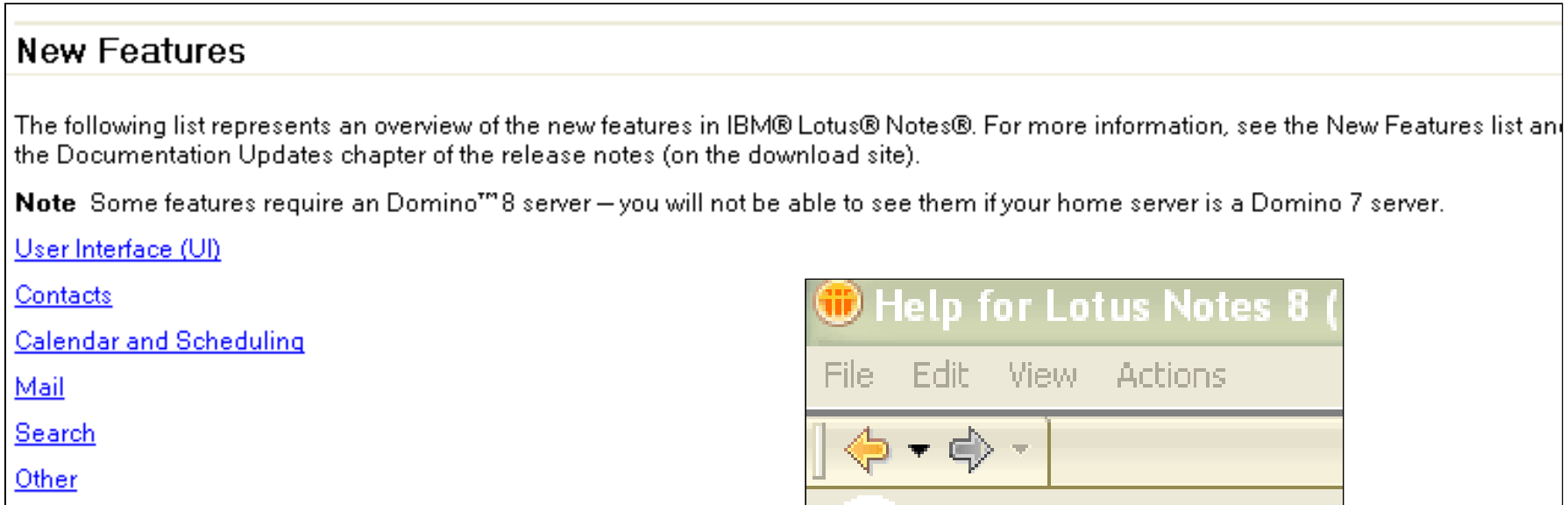
- **Release Notes**
- **Blogs**
- **These are quick reads because you are only reading for Lotus Notes**
 - ♦ **Not Designer!**
 - ♦ **Not Administrator!**
 - ♦ **Not Domino!**



**Where to
Find It**

Where to Find New Release Features (cont.)

- Right at the beginning of the Notes client help file



New Features

The following list represents an overview of the new features in IBM® Lotus® Notes®. For more information, see the New Features list and the Documentation Updates chapter of the release notes (on the download site).

Note Some features require an Domino™ 8 server – you will not be able to see them if your home server is a Domino 7 server.

[User Interface \(UI\)](#)

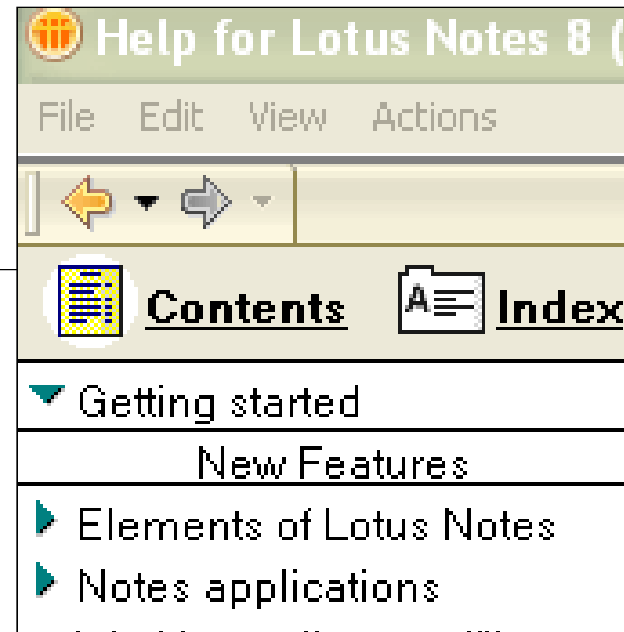
[Contacts](#)

[Calendar and Scheduling](#)

[Mail](#)

[Search](#)



[Other](#)



Help for Lotus Notes 8 (

File Edit View Actions

← ▾ → ▾

 **Contents**  **Index**

▼ Getting started

New Features

▶ Elements of Lotus Notes

▶ Notes applications



**Where to
Find It**

There's Tons of New Features ...

- **Use judgment to narrow down the features you tell them about — base it on your environment**
 - ◊ **Address issues that your users have been asking for**
 - ◊ **Bug fixes that have plagued your users specifically**
 - ◊ **New features that will especially complement your industry, or the way your users work**

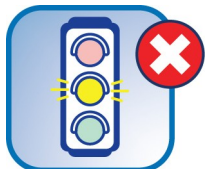


Checklist

Use this chance to re-tell them about old features they may have forgotten about! Make them “new”.

Making Release Notes Relevant

- Don't just highlight the release notes and then copy and paste it into a document you send to users
 - ♦ Filter out features you know they don't use, or technology they won't know or care about



Caution

Once those eyes blur over, the point of the email is lost. Get them excited to use all this cool stuff!

Notes 7 Features They'll Love

- **New mail rule: Stop processing rules**
 - ♦ End users are used to this from their home email
- **“Sort by subject” in mail file**
 - ♦ How many of us had to modify the mail template at our sites just for this anyway?
- **There is now a warning to save edited attachments before closing them**
 - ♦ Before, they vanished into the “Documents and Settings” Total Perspective Vortex of temp files

Notes 7 Features They'll Love (cont.)

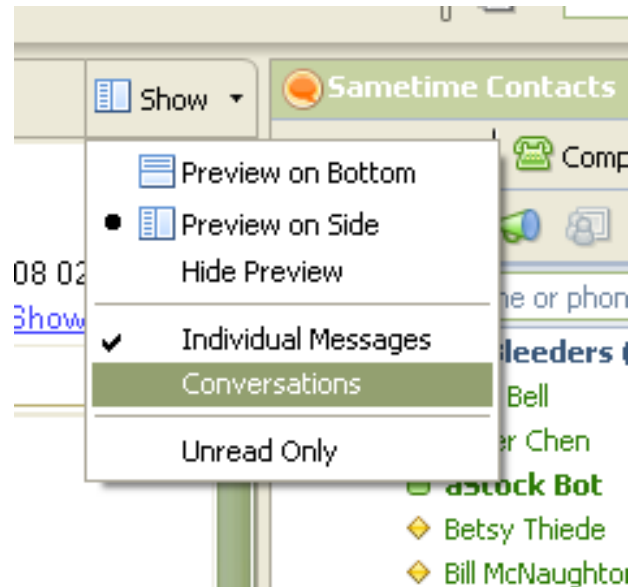
- **Resource Reservations have been improved so no more double bookings**
- **Autosave**
 - ◊ **Users can enable this in their Notes client**
 - ▶ **Or you can do it for them via a policy**
 - ◊ **Ask your users what forms they need autosaved**
 - ▶ **They must be enabled on the form level**

Notes 7 Features They'll Love (cont.)

- **Sametime presence awareness**
 - ◆ In mail files and contacts
 - ▶ **If you use Sametime, explain what these new icons mean so users can take advantage of them**
- **Discover folders**
 - ◆ New folder action in mail file → Discover Folders
 - ◆ This will tell them all the folders that a document is in

Notes 8 Features They'll Love

- **New vertical arrangement for mail file**
 - The preview pane can be on the bottom or the side
- **Inline spell checking**
- **The ability to view mail in conversation threads**

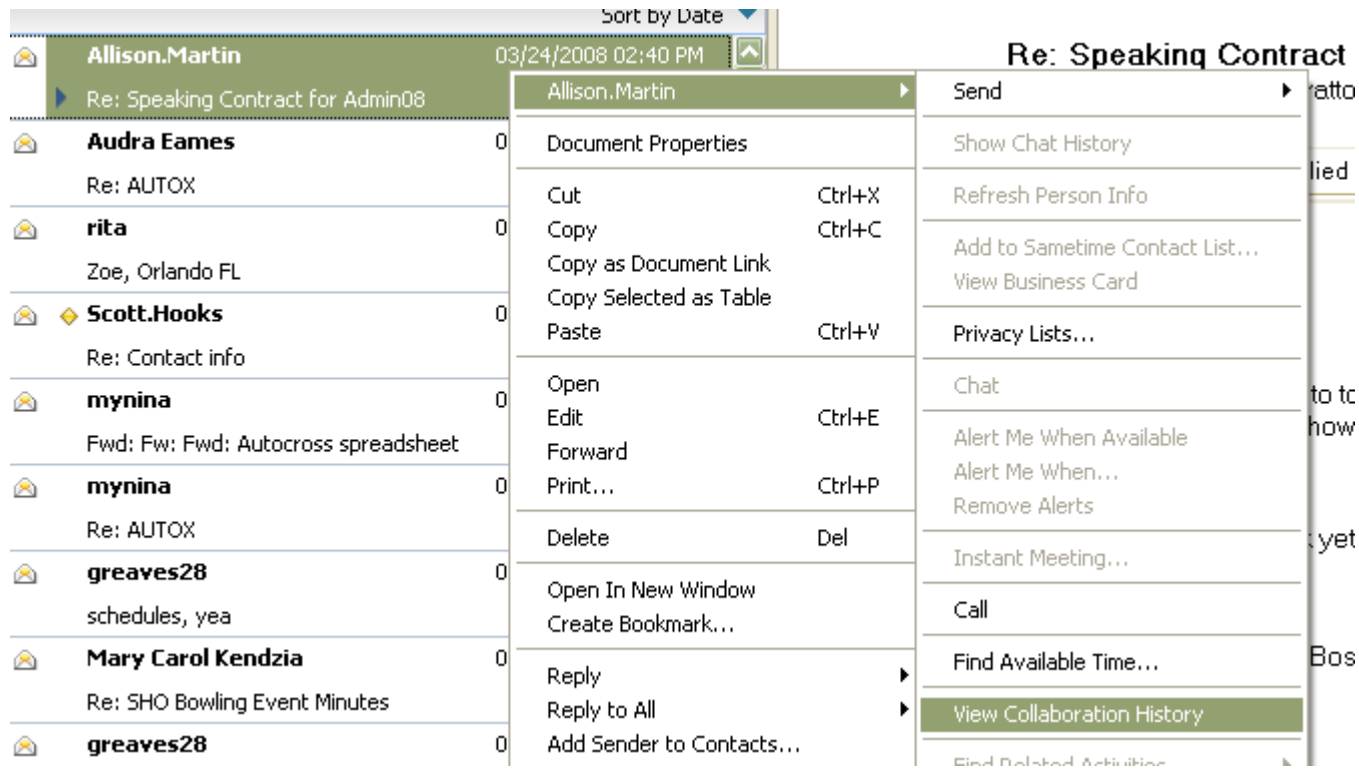


Notes 8 Features They'll Love (cont.)

- **Shared contacts**
- **Embedded browser in the Notes client is actually good**
 - ◊ **It can now be their system browser, which is what they know**
- **The Day-at-a-Glance view in the sidebar**
 - ◊ **This feature alone is worth rejoicing for**
- **The Recent Contacts view shows all contacts you have recently corresponded with via message or IM**

Notes 8 Features They'll Love (cont.)

- **Collaboration history is now in the mail file**
 - ♦ **This is hard to find by accident, make sure they know how to use it**



Notes 8 Changes They May Be Confused About

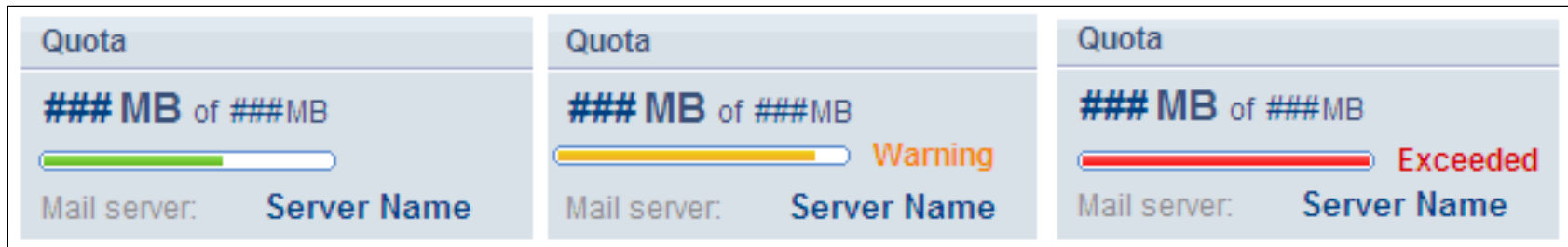
- **Selecting multiple documents**
 - ◊ This is now the “universal” method
 - ◊ CTRL+click for nonadjacent messages
 - ◊ SHIFT+click for adjacent messages
 - ▶ **Be sure to tell them these methods work for most other programs, including the Microsoft Windows Explorer file system**
- **Databases are now called “applications”**
- **Unprocessed calendar invitations are ghosted in the Calendar view**
- **Unread messages are now boldfaced, not red**



Heads-Up

Notes 8.0.1 Features They'll Love

- **Sidebar widgets**
 - ◊ Including support for Notes views and Google Gadgets
- **Live Text**
 - ◊ Pattern recognition on text where you specify the action it takes
- **Contacts has a great Business Card view**
- **Mail quota has visible indication at top left**



Source: IBM Technote 1291598

Notes 8.0.1 Features They'll Love (cont.)

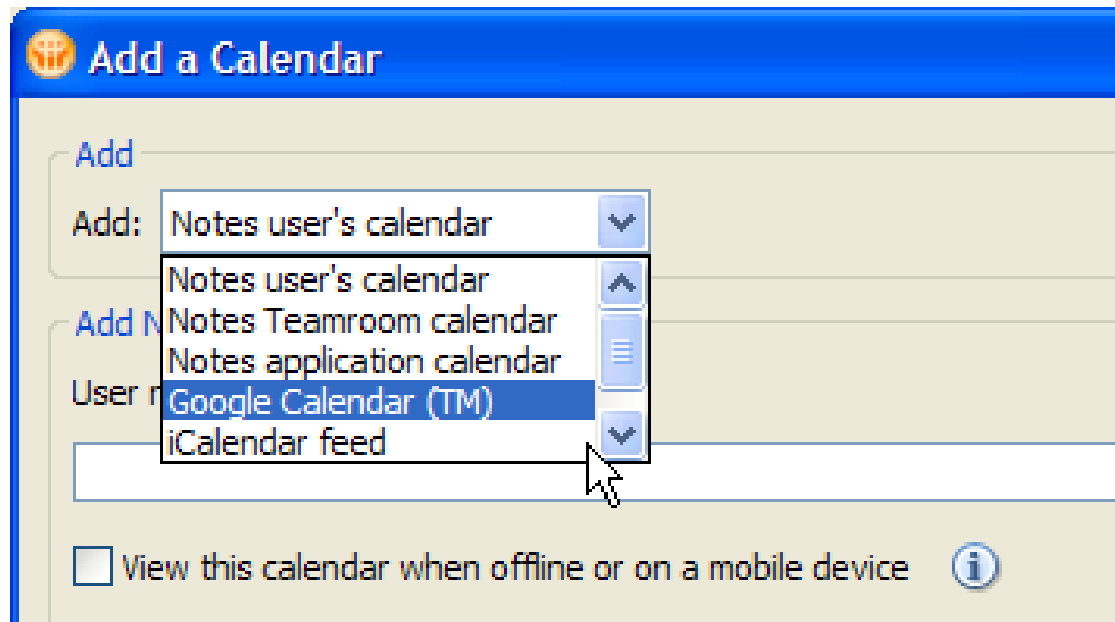
- **Drag-and-Drop**
 - ♦ Notes and browsers
 - ♦ Mail, calendar, and to-do bookmarks
 - ▶ **The Open window does not have to be docked!**
- **To-Do UI**
 - ♦ This has been given a modernized look

Notes 8.5 Features They'll Love

- **RIGHT-click options in Email and Contacts are greatly improved!**
 - ◊ **More choices, faster options**
- **Type-ahead in email now includes ALL email addresses for a particular user**
 - ◊ **Lets you choose Work, Personal, Gmail, etc.**
 - ◊ **Now it benefits users to populate any alternative email addresses any contact has!**

Notes 8.5 Features They'll Love (cont.)

- A new column in the All Documents view will display any folder that a message is in
- Support for Google Calendars!
 - Choose “My Calendars → Add a Calendar”



Notes 8.5 Features They'll Love (cont.)

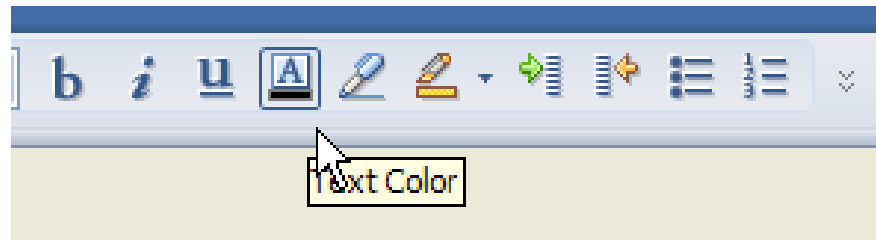
- **Contacts can now be imported easily**
 - ◆ **Open your Contacts database**
 - ◆ **File → Import contacts**
- **The Personal Journal is now called a “Notebook” and has a new look**
 - ◆ **Try it, it’s GREAT for keeping a database of reference material**
 - ▶ **Clippings from Web sites**
 - ▶ **Links from Web sites**
 - ▶ **Reminders, thoughts ...**

Notes 8.5.1 Features They'll Love

- **Right-click to mark documents read/unread!**
 - ♦ Oh, by the way, now users have a choice whether their unread documents are boldfaced or red
- **Mail signature files will be ignored in spell check!**
- **Spell check now can correct as you type!**
 - ♦ “teh” becomes “the”

Notes 8.5.1 Features They'll Love (cont)

- **Tables can be widened and manipulated inline**
 - ◊ **Resized, drag/drop, etc.**
- **It's now possible to accept/decline meeting invitations in the preview pane**
- **New toolbar options for changing text color, highlighter**



Notes 8.5.2 Features They'll Love

- **Cluster failover is now... drumroll... transparent!**
 - ◊ No more “would you like to switch to a replica on another server?” message!
- **Sort Inbox by message type**
 - ◊ Calendar invitation, memo, To Do, etc.
- **Set a preference to always show “Details” of an Inbox sender**
 - ◊ CC info, full email address, etc.

Notes 8.5.2 Features They'll Love (cont)

- **Set a preference to always get a return receipt for every message sent**

Send me a Return Receipt when recipients read mail I send

- **When using type-ahead to address an email, Groups now have an icon next to them identifying them as groups.**
- **Set a default font JUST for your mail!**
 - **Select Text-->Set as Mail Font when writing an email.**
- **Forward emails from the Trash without having to restore it first.**

Notes 8.5.2 Features They'll Love (cont)

- **Add ANY iCal feed to a Notes calendar**
 - **AND, have it also show up on a mobile device or offline!**
- **Choose what happens when a repeating event falls on a weekend.**
- **View entries by “Category” in calendar.**
- **Mark a contact as Private.**
- **Send an entire group to another user to import into their contacts!**

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Why Use Smart Upgrade?

- **Smart Upgrade**
 - ♦ Can be have a concurrent upgrade limit set via policy
 - ♦ Can force users to upgrade after a deadline that you set
 - ♦ Can be tracked via Smart Upgrade Tracking Reports
 - ▶ **Will only work for Notes 6 and higher**
 - ▶ **Will only track for Notes 7 and higher**
 - ♦ Can also upgrade the mail file via policy at the same time.
 - ♦ **Is FREE!**



**Best
Practice**

Smart Upgrade Overview — Four Easy Steps

- 1. Create a Smart Upgrade database to house your upgrade kit using the built-in template**
 - ♦ A “kit” is just a fancy word for the extracted install files
- 1. Update the configuration document with the location of the Smart Upgrade database**
- 2. Create a document in the Smart Upgrade database that contains the kit (or a link to the kit on a file server)**
- 3. Create or edit an existing desktop settings policy document and assign it to users**

Why Use a Silent Install?

- You choose the level of interaction you know your users are comfortable with
- Can be tracked with the Smart Upgrade Tracking Reports if used with policies
- Can also be used with third-party deploy software, such as Altiris
- If you use the defaults for your client installation, there is no need to use a customized installer package
 - ♦ The silent install switches will still work



Secret

Using the Silent Install Switches

- This is the Smart Upgrade kit document

After applying this kit, the client will be running this version of Lotus Notes:

Destination version: Release 7.0.3

Restart Notes after update: Restart

Location of update kit:

Location: On a shared network drive
 Attached to this note
 Shared network drive & attached kit

Full path to update kit: \\server\notesupgrade\$\setup.exe

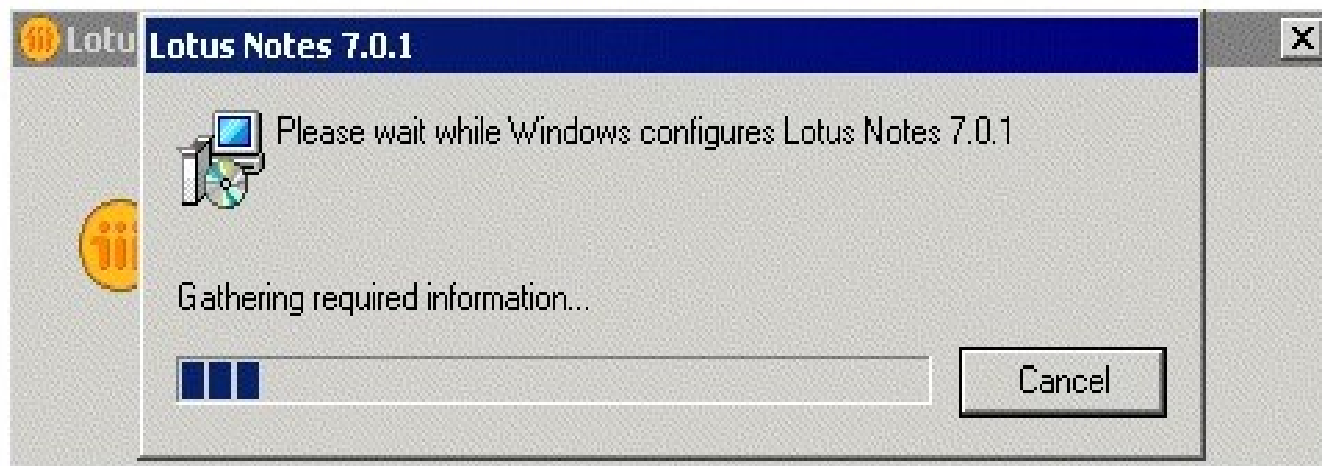
Optional arguments for shared network drive kit: /s /v"/qbl+"

What Do the Switches Mean?

- **/s** Initiates silent mode
- **/v** Initiates the passing of more arguments
 - **"/v" /qb"**
- **/qn+** Only visual notification is the dialog box showing installation is complete
- **/qb+** Same as above, but with a progress bar
- **!** Use this to hide the cancel button
- **-d** Put files in a temp directory first, and then delete them after
- **-s** Silently unpacks the kit on the user's machine and extracts to default location

Screenshots of the Silent Install Switches in Action

- **Install with /s /v"/qb+”**
 - ♦ **Silent install (/s)**
 - ♦ **Progress bar visible, prompt when complete (/qb+)**
 - ▶ **Just add an ‘!’ and that cancel button will disappear**



Screenshots of the Silent Install Switches in Action (cont.)

- The user is notified when the upgrade is complete



Smart Upgrade Gotchas

- **Problem: The user is not prompted to upgrade**
 - ◊ The user must be listed in the Smart Upgrade kit document
 - ▶ **Administration Tab → Allowed users field**
- **Problem: The policy is not set to users, yet they are being prompted to upgrade**
 - ◊ The policy is just for tracking purposes



If the user's client version matches the one in the kit and they are listed as an allowable user, they **WILL** be prompted!

Smart Upgrade Gotchas (cont.)

- **The install takes FOREVER!**
 - ◊ **Run a script or set an OS policy to disable anti-virus before installing**
 - ▶ **40+ minutes with anti-virus running**
 - ▶ **10-20 minutes with anti-virus disabled**

Smart Upgrade Gotchas (cont.)

- **Problem: Users upgraded, but now desktop shortcuts to Lotus Notes do not work!**
 - ♦ When using the default installation options, it installs to “C:\Program Files\Lotus”
 - ♦ If you upgraded on older machines, the executable was in “C:\Notes”
 - ♦ It may not delete the old icon
- **Problem: Multi-user install will work using default options, but will pop up a dialog box requiring an “are you sure” answer from the user**
 - ♦ Multi-user installs should use the custom tuner to specify the installation type



Heads-Up

Smart Upgrade Gotchas (cont.)

- **Problem: Smart Upgrade Tracking Reports are not being sent to the database**
 - ◊ This only works for clients 6.5.3 or higher
- **Problem: Users don't have admin rights to their own workstations and can't upgrade**
 - ◊ **After ND7, you can use the SURunAs utility from Lotus**
 - ▶ **Run the utility to set a username and password that will have rights to install the software on the machine**
 - *The utility will get packaged with the Smart Upgrade*
 - ▶ **Download the utility on Passport Advantage**



Smart Upgrade Gotchas (cont.)

- **Problem: If you are not using IM in your environment, users will get a “Setup instant messaging” dialog box the first time they launch the new client**
 - ◆ **A client Notes.ini parameter IM_NO_SETUP=1 is required**
 - ▶ **This can be added via customized policy document**
 - ▶ **Remember, the new addition in 8.5 Administrator:**
 - *Custom settings for Notes.ini parameters!*
 - *Desktop Settings → Custom Settings → Notes.ini*

Smart Upgrade Gotchas (cont.)

- **Sametime users are not reconnected or automatically logged in after an upgrade**
 - ◊ You may need to use the custom tuner
 - ▶ **Add the following lines:**

IM.Server=SametimeServerName

IM.ConnectWhen=0

IM.Protocol=0

Sametime Not Connecting Automatically

- **After the custom tuning parameters, add the following to the Desktop Settings policy document:**
 - ♦ **Found in Custom Settings → Managed Settings**

**host=SametimeServerName;com.ibm.collaboration.realtime.community
loginByToken=true; com.ibm.collaboration.realtime.community
authServerUrl=SametimeServerName;com.ibm.collaboration.realtime.community
loginAtStartup=true; com.ibm.collaboration.realtime.community
autologin=true; com.ibm.collaboration.realtime.login**

Upgrade the Mail File — Seamlessly!

- You can upgrade the user's mail file right after they've upgraded their client via Desktop Policy
 - ♦ It will happen automatically
 - ♦ You can prompt the user, or just go ahead and do it



Note

This can ONLY be done during a client upgrade. You can't retro-upgrade their mail file via policy later.

Desktop Policy Mail File Upgrades

- Go to the Basics tab of the Desktop Settings policy

Mail Template Information	How to apply this setting:	Inherit from parent policy:
Note: The information in this section is only used during client upgrades.		
Prompt user before upgrading mail file: (If users have multiple machines or custom folders that they don't want the design replaced on)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit
Old design template name for your mail files:	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit
If Running This Version Of Notes:	Use This Mail Template:	<input type="checkbox"/> Inherit
<input type="text" value="Release 8.5.1"/>	<input type="text" value="mail85.ntf"/>	<input type="checkbox"/> Don't set value
<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/> Don't set value

Specify the release, and the template that goes with it

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- DEMO!
- Wrap-up

After the Upgrade

- **Training is not just a three-day class held offsite somewhere tropical that costs thousands of dollars**
- **User training is:**
 - ◊ **A quick tip sent out via email**
 - ◊ **A quarterly newsletter of “cool things you can do with Notes”**
 - ◊ **Five minutes spent at someone’s computer answering a question they have**
 - ◊ **A lunch-hour tutorial on how to do basic tasks in a conference room with your laptop and a projector**
 - ▶ **Lunch must be provided for this to be effective 😊**

Customizing the Training for Your Environment

- **Why use your internal resources for training?**
 - ♦ **Users need to see their own Domino directories to relate to it**
 - ♦ **They need to see their own Resource Reservations**
 - ♦ **If they invite each other to meetings instead of “Sally Smith,” they are more likely to remember how to do it**
- **These small conference room training sessions don’t need much preparation time**
 - ♦ **You already know how to do these tasks, you could probably give a lesson that won’t take any of your time to plan**
 - ▶ **If you’ve upgraded to Notes 8, make sure they know how to do everything they used to do**

Quick Sheets Are Great for Users!

- **Companies like Nevada Learning and wareSource.com offer Quick Reference Guides for all Lotus products, versions, and languages**

Where to Find Quick Reference Guides?

- **Google**
 - ◊ Lotus Notes Quick Reference Guides
- **IBM developerWorks**
- **Make your own**
 - ◊ Use Microsoft Word to create text boxes to layout on the page
 - ◊ Include just the basics
 - ▶ Reply-to options
 - ▶ Mail rules
 - ▶ Stationery
 - ▶ Scheduler
 - ▶ Printing

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SMART UPGRADE



Demo

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Resources

- **Learning Lotus Notes Clients**
 - ♦ www.ibm.com/developerworks/lotus/notes/
 - ▶ It says “Developer Works” but it is for end users
- **Philip Monson, Julie Castle, Robert Harrison, Arnaz Rustomji**
“Understanding Lotus Notes Smart Upgrade” (IBM Redbook)
 - ♦ www.redbooks.ibm.com/redpapers/pdfs/redp4180.pdf
- **IBM Redbook “IBM Lotus Notes and Domino 8 Deployment Guide”**
 - ♦ www.redbooks.ibm.com/abstracts/sg247506.html
- **Release Notes**
 - ♦ www.ibm.com/developerworks/lotus/documentation/releasenotes/
- **Blogs**
 - ♦ www.planetlotus.org

7 Key Points to Take Home

- **Email your users updates with every step of the upgrade process, from project conception to post-upgrade**
- **Always tell users how long it will take if you need them to do something interactive**
- **Make sure you speak the same language as your end users**
- **When sending “new feature” lists to them, filter out features they don’t use or won’t care about**

7 Key Points to Take Home (cont.)

- **The Smart Upgrade WILL deploy to users who are allowed to use it without needing a policy in place**
- **Don't forget to upgrade the mail file at the same time!**
- **Training isn't just a three-day course**
 - ◊ **Any time you show a user something they didn't know before that helps them to do a task better, you are training them**

Your Turn!



Questions?

How to contact me:
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