Technical Deep Dive Session

IBM Lotus Notes & Domino 8 Launch
Today’s agenda

Planning your Lotus Notes & Domino 8 Rollout:

- Why Everyone Will Want Lotus Notes 8
- Hardware and Software Requirements
- Install and Upgrade Options
- Pre-upgrade / Post-upgrade Checklist
- Integrating with Lotus Collaboration Tools

*Lotus Notes & Domino 8 software is a lot more than just another pretty [inter-] face!*
Your users are going to want Lotus Notes 8
Enjoy working with a cool, new user interface.
Unified Preference

A single location to configure all preferences associated with the Lotus Notes client
Easy to access important information

Dynamic Help

Group documents in tabs
Quicker to find recent mail addresses

Simplified mail header

Recall Mails
### Calendaring & Scheduling

<table>
<thead>
<tr>
<th>Time</th>
<th>Monday, June 25 2007</th>
<th>Tuesday, June 26 2007</th>
<th>Wednesday, June 27 2007</th>
<th>Thursday, June 28 2007</th>
<th>Friday, June 29 2007</th>
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<tr>
<td>7:00</td>
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<td>9:00</td>
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<td>1:00</td>
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<td></td>
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<td>ND8 Training</td>
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<td>2:00</td>
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<td></td>
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<tr>
<td>3:00</td>
<td>Planning for ITSO Summer</td>
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<td></td>
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<tr>
<td>4:00</td>
<td></td>
<td></td>
<td></td>
<td>Stakeholder Meetings</td>
<td></td>
</tr>
<tr>
<td>5:00</td>
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<td></td>
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</tr>
</tbody>
</table>
Contacts

- Mail
- Calendar
- Instant chat
Synchronize contacts with Domino Web Access

Contacts Preferences
- Contacts owner: Rishab Sharma\INDIA\ITSO
- Sort groups alphabetically
- Optimize index for advanced searching of Contacts
- Always accept the default name assignment when adding contacts
- **Enable "Synchronize Contacts on the Replicator"** (Required for Contacts delegation and Domino Web Access Contacts synchronization)
- Do not automatically add names to the Recent Contacts view
- Delete documents in my Trash after 48 hours

Replication
- Enabled: Yes
- High Priority: Yes
- Application: Synchronize Contacts
- Last Run: 10:51 AM Today
- Scope: All

Welcome, Rishab Sharma

My Contacts
- View by name
- View by email
- View by company

Contacts
- Name
- Phone List
- Email
- Company

Administrators, Portal
- Name: Administrator, Portal
- Phone: 0001
- Email: admin@ITSO
- Company: ITSO Corporation

Caste, Julie
- Name: Caste, Julie
- Phone: 0002
- Email: julie.caste@itso.com
- Company: ITSO

Lieder, Stacy
- Name: Lieder, Stacy
- Phone: 9999
- Email: stacy.leder@itso.com
- Company: ITSO

Monroe, Phillip
- Name: Monroe, Phillip
- Phone: 8888
- Email: philip.monroe@itso.com
- Company: ITSO

Ogunbowale, Olanika
- Name: Ogunbowale, Olanika
- Phone: 2222
- Email: olanika.ogunbowale@itso.com
- Company: ITSO

Sharma, Geetanjali
- Name: Sharma, Geetanjali
- Phone: 111111
- Email: geetanjali.sharma@itso.com
- Company: ITSO

Bhakun, Bipul
- Name: Bhakun, Bipul
- Phone: 91-99-999999
- Email: bipul.bhakun@itso.com
- Company: ITSO

Bhakun, Bipul
- Name: Bhakun, Bipul
- Phone: 91-99-999999
- Email: bipul.bhakun@itso.com
- Company: ITSO
Whitepaper - Overview of productivity tools:
More, more, and more …

to help you work more effectively and have greater impact on your business

- Document Selection
- Multilevel Undo
- F5 to refresh
- Drop-down menu
- Search Center
- Sidebar
- Inline Spell Check
- Mark Subject Confidential
- Improve printing of tabbled table
- Mark Subject confidential
- Support for common operating system keyboard and mouse-click shortcuts and commands
- Improved display of calendar events
- Check calendar while you are scheduling a meeting
- Options to manage meeting cancellations
- More flexible free time search
- Flexible Contact form
- Recent Contacts
- Enhanced instant messaging integration
- RSS Reader
8 Reasons **IT Managers** will love ND8

- Enhance your workforce effectiveness with a cool, new **user interface**.
- Protect your investments with IBM.
- Take back control of the desktop with **simplified upgrade** and **management capabilities**.
- Increase your **agility** and **responsiveness** with an open, standards-based, **plug-n-play architecture**.
- Realize **collaboration beyond e-mail** with a fully integrated client experience.
- Optimize your IT investment with **embedded office productivity tools**.
- Make the right choices for your infrastructure with **client** and **server platform flexibility**.
- Protect your investment with **industry-leading security** features, proven **reliability** and **high availability**.
Plan what to deploy
Hardware and Software Requirements

- **IBM Lotus® Domino® Server Operating Systems**
  - Microsoft® Windows® 2003 Server
  - IBM AIX® 5.3
  - Novell SUSE Linux 10
  - Red Hat Enterprise Linux® 5
  - Sun Solaris 10
  - IBM i5/OS®, V5R4
  - IBM z/OS® Version 1, Release 7 or later

- **Memory Requirements**
  - 1GB MB RAM minimum

- **Disk Space Requirements**
  - 2.5 GB minimum

see [http://www-1.ibm.com/support/docview.wss?rs=463&uid=swg27009484](http://www-1.ibm.com/support/docview.wss?rs=463&uid=swg27009484) for more information
Hardware and Software Requirements

- **IBM Lotus Notes® Client**
  - **Standard Configuration**
    - **Operating System Requirements**
      - Microsoft Windows XP, Windows Vista
      - Novell SUSE Linux Enterprise Desktop 10 XGL
      - Red Hat Enterprise Linux Desktop 5
    - **Memory Requirements**
      - 512 MB RAM minimum, 1 GB RAM recommended
    - **Processor Requirements**
      - Intel® Pentium® 4, 1.2 GHz minimum
  - **Basic Configuration**
    - **Operating System Requirements**
      - Microsoft Windows XP, Windows Vista
    - **Memory Requirements**
      - 256 MB RAM minimum, 512 MB RAM recommended

*Basic Configuration supports Administrator and Designer Clients*

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Lotus Notes Client Options

- Lotus Notes Client
  - Eclipse-based
  - Preferred configuration, full-featured

- Basic Configuration
  - Microsoft Windows C++ client
  - For less powerful desktops
  - Does not support composite applications, plug-ins, or Java™ views

- IBM Lotus Domino Web Access
  - Browser-based Access
Basic Configuration
### Lotus Notes Client, Basic, and Lotus Domino Web Access Feature List

<table>
<thead>
<tr>
<th>Feature</th>
<th>Notes</th>
<th>Basic</th>
<th>DWA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Button</td>
<td>⭐</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sidebar Plug-ins</td>
<td>⭐</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grouped Document Tabs</td>
<td>⭐</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thumbnail View</td>
<td>⭐</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unified Preferences</td>
<td>⭐</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multi-level Undo</td>
<td>⭐</td>
<td>⭐</td>
<td></td>
</tr>
<tr>
<td>In-line Spell Checking</td>
<td>⭐</td>
<td>⭐</td>
<td></td>
</tr>
<tr>
<td>Windows Selection Model</td>
<td>⭐</td>
<td></td>
<td>⭐</td>
</tr>
<tr>
<td>Collaboration History</td>
<td>⭐</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Window Themes</td>
<td>⭐</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search Center</td>
<td>⭐</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IBM Support Assistant</td>
<td>⭐</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feature</td>
<td>Notes</td>
<td>Basic</td>
<td>DWA</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------</td>
<td>-------</td>
<td>-----</td>
</tr>
<tr>
<td>Mail Header</td>
<td>⭐</td>
<td>⭐</td>
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</tr>
<tr>
<td>Mail Addressing (Recent Contacts)</td>
<td>⭐</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vertical Preview</td>
<td>⭐</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conversations</td>
<td>⭐</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mail Recall</td>
<td>⭐</td>
<td>⭐</td>
<td></td>
</tr>
<tr>
<td>Out of Office Enhancements</td>
<td>⭐</td>
<td>⭐</td>
<td>⭐</td>
</tr>
<tr>
<td>New Calendar Views</td>
<td>⭐</td>
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<tr>
<td>Unprocessed Meeting Invitations</td>
<td>⭐</td>
<td>⭐</td>
<td>⭐</td>
</tr>
<tr>
<td>Check Calendar Creating New Meeting</td>
<td>⭐</td>
<td>⭐</td>
<td></td>
</tr>
<tr>
<td>Uncheck Invitees When Scheduling</td>
<td>⭐</td>
<td>⭐</td>
<td></td>
</tr>
</tbody>
</table>
Lotus Notes Client, Basic, and Lotus Domino Web Access Feature List

<table>
<thead>
<tr>
<th>Feature</th>
<th>Notes</th>
<th>Basic</th>
<th>DWA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal notes to Meeting</td>
<td>★</td>
<td>★</td>
<td></td>
</tr>
<tr>
<td>Business Card Contacts View</td>
<td>★</td>
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<td></td>
</tr>
<tr>
<td>IBM Lotus Sametime® 7.5.1 Contacts</td>
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</tr>
<tr>
<td>Composite Applications</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>


Or Appendix A: Lotus Notes 8 client feature requirements of ND8 Reviewers Guide for more information
Lotus Notes 8 Mail Template

- MAIL8.NTF used for Lotus Notes and Lotus D
- Some features rely on new template
  - Mail header
  - Addressing (Recent Contacts)
  - Vertical Preview
  - Conversations
  - Mail Recall
  - Out of Office improvements
  - New Calendar Views
  - Unprocessed Meeting Invitations
  - Check Calendar Creating New Meeting
  - Uncheck Invitees When Scheduling
  - Personal notes to Meeting

*see Appendix B: Lotus Domino 8 server feature requirements of ND8 Reviewers Guide for more information*
### Mail Templates Compatibility

#### A. Domino 8 Mail Template (Mail8.ntf)

<table>
<thead>
<tr>
<th></th>
<th>Notes 8.0 Client</th>
<th>Notes 7.x Client</th>
<th>Notes 6.5.6 Client</th>
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</thead>
<tbody>
<tr>
<td>Domino 8.0 Server</td>
<td>Supported</td>
<td>Supported during upgrade only</td>
<td>Supported during upgrade only</td>
</tr>
<tr>
<td></td>
<td></td>
<td>NOTE #1</td>
<td>NOTE #1</td>
</tr>
<tr>
<td>Domino 7.x Server</td>
<td>Supported during upgrade only</td>
<td>Supported during upgrade only</td>
<td>Supported during upgrade only</td>
</tr>
<tr>
<td></td>
<td>NOTE #3</td>
<td>NOTE #3</td>
<td></td>
</tr>
<tr>
<td>Domino 6.x Server</td>
<td>Supported during upgrade only</td>
<td>Supported during upgrade only</td>
<td>Supported during upgrade only</td>
</tr>
</tbody>
</table>

#### B. Domino 7 Mail Template (Mail7.ntf)

<table>
<thead>
<tr>
<th></th>
<th>Notes 8.0 Client</th>
<th>Notes 7.x Client</th>
<th>Notes 6.x Client</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domino 8.0 Server</td>
<td>Supported</td>
<td>Supported</td>
<td>Unsupported</td>
</tr>
<tr>
<td>Domino 7.x Server</td>
<td>Supported</td>
<td>Supported *</td>
<td>Unsupported *</td>
</tr>
<tr>
<td>Domino 6.x Server</td>
<td>Supported during upgrade only</td>
<td>Supported (Not Recommended) *</td>
<td>Unsupported *</td>
</tr>
</tbody>
</table>

[see http://www-1.ibm.com/support/docview.wss?rs=475&uid=swg21264690 for more information]
Upgrade Path 8

Lotus® Domino Servers

Lotus® Notes Clients

Applications
<table>
<thead>
<tr>
<th>Step</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Upgrade/install the Domino Administrator Clients</td>
</tr>
<tr>
<td>2.</td>
<td>Upgrade the Domino directory design</td>
</tr>
<tr>
<td>3.</td>
<td>Upgrade Admin server and system databases</td>
</tr>
<tr>
<td>4.</td>
<td>Upgrade Hub and Directory servers</td>
</tr>
<tr>
<td>5.</td>
<td>Upgrade the Mail Application and Web servers</td>
</tr>
<tr>
<td>6.</td>
<td>Upgrade the Notes clients</td>
</tr>
<tr>
<td>7.</td>
<td>Upgrade the design of mail and application databases to enable new Domino 8 features</td>
</tr>
<tr>
<td>8.</td>
<td>ODS upgrade</td>
</tr>
<tr>
<td>9.</td>
<td>Install additional server components to extend Domino capabilities</td>
</tr>
</tbody>
</table>
Compatibility makes it easy to upgrade

No Rip and Replace because Lotus Notes and Domino 8 is compatible with previous versions:

- Same proven infrastructure
- Same data stores
- Same model for customizing the mail template
- Same Security infrastructure
- Same Directory
- Same Admin tools
- Same Replication
- Same set of application APIs
Pre-installation Steps

- Clean up of system files
  - clean up all unused program
  - configuration documents
  - server connection documents
  - even databases

- Review Notes.ini settings

- Backup system files
  - Server ID and all other IDs present on your system
  - Notes.ini files
  - Domino directory
  - Log.nsf, to provide a record of your previous server activities
  - All other directory databases such as the Directory Assistance, Extended Directory Catalog, Condensed Directory Catalog and Schema database
  - Any customized templates
  - Any third-party add-ins binaries or executables and extension managers
Pre-upgrade checklist

1. Verify the Domino directory design, run the updall -R to rebuild the views.
2. Backup any files that have been updated or were not backed up
3. (optional) Disable Domino directory replication.
4. (optional) Disable other connection documents (replication and routing).
5. Restrict server usage using the server_restricted=1 and drop all users from server sessions. To maintain the setting after a Domino server restart use server_restricted=2.
6. Force routing of all mails still waiting for delivery, and then stop the router and SMTP tasks.
7. (optional) Purge all administrative requests.
8. If running Domino as a service on Windows, change to Manual.
9. Disable any cron jobs on UNIX platforms that automatically restart Dominos and clean up shared memory segments.
10. Stop the Domino server.
Post-upgrade checklist

- Verify Databases and Templates
  - remove unused templates
- Perform maintenance operations
  - compact on names.nsf and admin4.nsf
- Rebuild view of names.nsf offline
  - updall -R
- Delete busytime.nsf and move out the log.nsf file and mail.box file(s)
- Restart the server
- Enable server auto startup if disable from Pre-upgrade checklist
- Enable Replication and Routing Connection documents if disable from Pre-upgrade checklist
- Perform testing
Install and Upgrade Options

- Upgrades supported from Lotus Notes 6.5
  - Existing bookmarks included in Open button menu
  - Same ODS by default
- MSI
  - Support for scripted, “silent” installs
- Smart Upgrade
  - Tracks client version
  - Sends upgrade notification
  - Configurable upgrade message, grace period, mail template
Desktop of the future: Managed Client

Lotus Domino 8 Server

- Smart Upgrade kits
- Component updates
- Composite apps

Lotus Notes 8 Client

- Notes Smart Upgrade (versions only)
- Component provisioning (features)
- Traditional & composite applications (features)
End User Training Considerations

- Productivity Tools will take time to learn
  - Know the functionality your users take advantage of and target it

- The Lotus Notes user interface
  - Basics come naturally
  - Good idea to point them to new functionality

- From IBM resources
  - 2 Pages training card
  - 15 mins video
IBM Lotus Collaboration Portfolio

- Rich Client
- Browser
- Portal
- Mobile
- RSS / Atom
- Microsoft® Office
- eForms

- Lotus Notes: Mail, calendaring and collaborative applications
- Lotus Sametime: Unified communications and collaboration services
- Lotus Quickr: Collaborative content and team services
- WebSphere® Portal: Composite application and integration services
- Lotus Connections: Social software for business
Included with Notes & Domino*…

- IBM Productivity Tools
- Lotus Sametime’s instant messaging & presence awareness
- IBM DB2 features
- IBM WebSphere® Portal Server (limited entitlement)
- IBM Tivoli® Directory Integrator features

And coming soon…
- IBM Lotus Quickr® Personal Edition

* Restrictions apply
IBM Productivity Tools

- Installed with Lotus Notes client
- Run inside Lotus Notes client
- Can be run separately
- Eclipse-based
- Open
  - Microsoft Office
  - IBM Lotus SmartSuite®
  - Open Document
- Save
  - Microsoft Office
  - Open Document
  - PDF

Whitepaper - Overview of productivity tools:
Lotus Sametime Contacts

- Based on Lotus Sametime 7.5.1 release
- Available in the sidebar
- Limited use of presence awareness and chat
- Possible to enable "embedded" clients to use full feature set with full Lotus Sametime license
IBM WebSphere Portal

- Access composite applications on your IBM WebSphere Portal server from your Notes 8 client
IBM Lotus Connections

- Activities plug-in is a Lotus Notes install option
- Activities Server purchased separately
- Connections 1.0 based on IBM WebSphere Application Server
  - Lotus Domino LDAP directory support currently planned for future release
- Must be connected to Activities server
IBM Lotus Quickr

- Connector for Lotus Notes is currently planned to be available from the Lotus Quickr team
- Send links to Lotus Quickr Places instead of attachments
- Tighter integration with Lotus Notes mail template planned
- Sidebar plug-in is currently planned
Key benefits of Notes 8

- Improved user interface
- Productivity Editors
- Eclipse and open platform
- Composite Applications
- Enhancements to core mail, calendar, and contacts
- Continued multiplatform support (Windows, Linux; Mac to follow)
- Server-managed and provisioned
- NO rip and replace
Lotus Domino 8

- New and enhanced messaging
  - Message recall
  - Improved out-of-office
  - Web password lockout

- Dramatic improvements in admin, performance and security

- Open applications infrastructure
  - Web services provider & consumer
  - Support for IBM DB2® as alternative data store

- Consistent architecture
  - Simple upgrade
  - Same API’s
  - Same infrastructure
  - Management and provisioning of Notes 8 right from the Domino server
Collaboration Beyond Email
Calendar, instant messaging, team documents, productivity tools, applications...

Protect Information
Control access, encrypt data, high availability

Increased Business Agility
Open, standards-based, extensible, platform flexibility

Investment Protection
Simple upgrade, leverage existing applications, managed desktop
Find the “What’s New” Brochure at:

Find the Reviewer’s Guide at:
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