

# **Effectively Training Notes Users**

A comparison of the end user training options for IBM Lotus Notes

**By:**

Howard Greenberg, Director  
The Learning Continuum Company, Ltd.  
[Http://www.tlcc.com](http://www.tlcc.com)  
[Sales@tlcc.com](mailto:Sales@tlcc.com)  
888-241-8522 or 561-953-0095

**May 14, 2009**

Copyright: The Learning Continuum Company, Ltd., 2003 - 2009

## **Why Provide Training to Your Notes Users?**

Many companies choose not to provide any training for their Notes users. This decision usually is based on budget and manpower concerns. These companies adopt the approach of letting users fend for themselves. Unfortunately, this “no training” approach has significant drawbacks:

Increased help desk calls - Without proper training users are unable to resolve questions themselves. They often lack the skills to research the problem themselves using the Notes help system. Instead, they get frustrated, pick up the phone, and call the help desk. During an upgrade to Notes 8, the number of help desk calls can quickly overwhelm help desk personnel. Pacific Gas & Electric Co. (PG&E) spends an average of \$22 per help desk call<sup>1</sup>. These additional costs will significantly increase the total cost by the organization for each help desk call. If an organization has 20,000 users and 20% of the users call the help desk then help desk costs would be \$88,000. If training reduced the amount of calls by 50% then the savings would be \$44,000! This average call cost does not even include the costs and lost productivity by the user calling the help desk.

Not getting the maximum ROI - Notes has many capabilities for both e-mail and group collaboration, workflow processes, and document management. If the users are not provided training then they learn just the rudimentary basics such as sending emails. Training can open the doors towards using Notes to its fullest, such as; managing calendars, To-Do lists, address books, searching for information, using databases and working remotely. This maximizes the user’s productivity and the organization’s return on investment in Lotus Notes. If proper training saved just 5 minutes per day per person by increasing productivity, then the total savings amounts to over 21 hours per person per year. This equals 420,000 hours of increased productivity for a 20,000 person organization!

Training your Notes users results in significant cost savings and is less expensive than the alternative of providing no training at all. In addition, the intangible cost of employee morale must be considered. When a company installs new software (or a new version of existing software) and does not provide training, users can get very frustrated trying to teach themselves how to use the new software (or a new version.) The frustration often results in decreased employee morale.

### **Training Options Available**

Once the decision has been made to train users on the Notes client then there are a variety of options to consider.

Classroom - Classroom based training can be very effective since the student is isolated from outside distractions for the duration of the training. A key to successful classroom training is the availability of a computer for each student. This allows the students hands on experience trying out what they have just learned. This hands on experience tremendously reinforces the lesson just taught. Classroom training without proper reinforcement exercises can quickly bore the

---

<sup>1</sup>ComputerWorld article, July 22, 2002, How PG&E Counts IT Help Desk Costs, <http://www.computerworld.com/managementtopics/roi/story/0,10801,72812,00.html>

student. Most of what was taught is forgotten before the user has an opportunity to get back to their desk and try out the topics covered in the class.

Classroom training has a significant number of disadvantages:

- Cost of classroom facilities sufficient to train the user population
- Difficulty of training remote users without incurring significant travel costs
- Instructor costs - One instructor can train approximately 15 students per day. To accomplish training a 20,000 user population would require over 1,300 instructor days. To complete the training in two months would require 33 instructors working 5 days a week for two months.
- Student's lost productivity - The cost of lost productivity has to be factored in. Most user courses require at least one day of time away from the desk. Scheduling concerns also arise and in today's busy environment most users are reluctant to spend an day away from their desk while emails and voice mails build up in their absence.
- Cost of learning materials - The training manuals used have to be purchased from Lotus or a third party or developed in-house.
- Cost of managing training - A registration system is required to enroll students in classroom training. Support personnel must also be scheduled. Planning to procure classrooms, instructors, and course materials is required and can be quite extensive.

Computer Based Training (CBT) - has the following attributes; it is delivered via a browser or a stand-alone program, has no instructor support, and typically has exercises or activities that simulate the Notes environment. CBT's are popular due to the high costs of classroom training .

CBT's have the following advantages over classroom training:

- Cost - CBT's are significantly less expensive than classroom training. There are no classrooms and no instructors.
- Student's train at their own schedule - Students can start and stop the course at any time and can take it at their leisure.

CBT's have some significant drawbacks:

- Course installation on each user's computer for non-browser based courses is required.
- Poor quality - many CBT's are of questionable quality and do not adequately cover the necessary material required to learn to use Notes effectively.
- Lack of integrated exercises - Since the students work in a environment other than Lotus Notes, CBT's often lack interesting, real-life exercises and activities. Typically any provided exercises or activities are simulations of Notes. These simulations tend to be very limited. They typically do not allow the student the same interaction compared with actually using Notes.
- Lack of exams - Most of the existing Notes CBT's do not offer a gradable final exam to measure the student's completion of the course.

Notes based training - is very similar to a CBT however there are some key differences. The training is delivered via a Notes database and the Notes client. This allows for easy installation as the courses can be installed on a Domino server. Users can then access the course via their Notes client. Remote users can easily make a local replica of the training course. They can then take the course without having to be connected to the network. Notes based training can take advantage of the collaboration in Notes and Domino to provide a replicated course discussion database for students to interact with instructors/mentors.

The advantages of Notes based training are:

- Low cost - Notes based training is much less expensive than classroom training. It is similar in cost to CBT's. For example, TLCC's user training, a leading provider of Notes based training for Notes users, is 75 cents per user (for 50,000 users.)
- Easy to deploy - A course can be easily deployed to all users by simply placing the course databases on a Domino server(s). Users are then simply sent a link to the course. No local installation is required. Courses can be replicated among company locations and can be replicated locally for remote user access.
- Real life exercises and demonstrations - Students can link directly from the course material to real life exercises and demonstrations done right in the Notes client. This allows for direct feedback and practice of a topic unlike a limited simulation of Notes such as a CBT provides. A study conducted by the University of Nebraska said that users who performed exercises while undergoing computer based training "did significantly better in both time and errors than those trained using guided-exploration."<sup>2</sup>
- Instructor interaction - A course discussion database can be linked directly to the course lessons to allow for students to interact with the course instructors/mentors.
- Students learn at their own pace - Students can take the training whenever they have time and can go at whatever pace they desire, similar to CBT's..
- The course is always available to the user as a reference. Help Desk personnel can send emails with Notes doclinks to a procedure or explanation in the course in response to user questions. The user can then just click on the link to go directly to the part of the course that answers their questions.

Books and Videos - Books and videos are another training option. Typically, most companies do not use this option for their entire user population but may enable selected users to order a book or video. Books and videos do not provide for any interaction with the student, and do not allow for hands on activities and/or demonstrations. They are also costly to distribute to a large user population and are expensive to buy in large quantities.

Blended Approach - some companies use a combination of classroom training to get the users started and then follow that up with Notes based training or CBT's to allow the users to continue their Notes education at their own pace when they return to the office.

---

<sup>2</sup>End-user training: an empirical study comparing on-line practice methods, by Susan Wiedenbeck, Patti L. Zila, and Daniel S. McConnell, [http://www.acm.org/sigchi/chi95/proceedings/papers/sw\\_bdy.htm](http://www.acm.org/sigchi/chi95/proceedings/papers/sw_bdy.htm)

## Comparison of User Training Options

	Books	CD or Web-based training	Classroom training	TLCC's Notes based training
<b>Quality</b>	Varies depending on author	Varies depending on provider	Varies depending on instructor and course materials	Consistently very high quality. TLCC's writers and instructors are all experts in their fields.
<b>Hands-on activities</b>	Limited exercises (paper-based) and no demonstrations	<i>Simulated</i> exercises or demonstrations, usually relies on screen shots for demos	Depends on the class, can be a lot of hands-on activities if computers are furnished for each student.	Excellent. All demos and activities are done in the Notes client. <i>No simulations are used.</i>
<b>Convenience</b>	Can read the book at your own pace but need to type in and set up practice activities	Most courses can be taken at your own schedule, although Web-based courses require Web connection.	Student must go to the classroom. Often travel may be required for smaller sites and/or remote users.	Take courses when and where you want - at your own pace. No need to be on-line when taking the course.
<b>Learning effectiveness</b>	Generally poor retention due to minimal hands-on activities	Simulated activities do not facilitate real-life problem solving.	Can be very good, but class moves at the pace of the slowest "vocal" student	High retention, many real-life activities and demos. Courses can be saved for future reference.
<b>Quizzes and Final Exam</b>	None	Most vendors do not offer quizzes. No way to measure student completion of a course.	Usually none.	TLCC offers quizzes to allow the student to test themselves and a graded final exam.
<b>Instructor support</b>	None	None	During the class	Integrated Discussion database allows support of the students.
<b>Cost</b>	Low for a single purchase but expensive in large quantities	More expensive than TLCC's courses	Usually about \$200 per training day per student plus lost productivity while students attend class.	TLCC's user courses are much less expensive than classroom training, plus, students can take the course when they have time.

## TLCC's Notes based user courses

The Learning Continuum Company has pioneered the use of Notes based training. Their first courses were introduced in 1997 for Notes/Domino developers. Customers soon asked TLCC for the same high quality, effective training for their users. TLCC introduced user courses in 1999. With the release of Notes 8 and 8.5, TLCC introduced five courses for Notes 8 users, an update course for users upgrading from 7 to 8 or 8.5, an update course for users upgrading from 6 to 8 or 8.5, and a course for users new to Notes (both 8.0 and 8.5 versions.) Finally, there is a Using iNotes 8.5 course. All the TLCC courses are included in the single site license fee.

**Customizable** - TLCC's courses are delivered as a set of Notes databases. The content can be fully customized to allow for adding new material specific to a organization's implementation of Notes. Lessons can even be added to teach custom applications used within an organization such as travel expense reporting or sales force automation. All customization work is done using the familiar Notes client. Different instances of the course can be created for different groups of users. For example, you could have an "office" and "mobile" version of the course, each customized to suit the needs of the different groups of Notes users. CBT offerings do not offer this customization ability.

**Use Notes to learn Notes** - When comparing TLCC's Notes user courses to other training methods on the market, the biggest difference - and greatest benefit - is that TLCC courses use the Notes client and are delivered using the Domino server. TLCC courses do not simulate the Notes environment. Instead, they are specifically designed to leverage Notes and Domino as the most effective delivery medium for Notes training. The best way to deliver Notes training is by *using* Notes - not a simulation of it. All demonstrations and student activities use the Notes client. This provides the highest level of learning reinforcement and effectiveness.

The advantages of delivering Notes training using Notes include:

- The course is delivered to each student's workstation using existing Notes and Domino infrastructure.
- No additional hardware, software or licensing requirements.
- No additional classroom, travel, or out-of-office costs.
- Use the familiar Notes client to customize the course content to your specific requirements and to deploy, administer and support the course.
- Integrated student activities are highly interactive and provide immediate reinforcement of lesson material.
- No simulations. Real Notes student activities are the most effective way to reinforce learning Notes.
- Real Notes student activities provide the most engaging, challenging and fun student interaction.

TLCC's Notes 8 user courses can be taken by a student using either a Notes client or a web browser. Users with a Notes 6 or Notes 7 client or a web browser will not be able to do the

exercises or demonstrations but can read the lessons to get started. When they have been upgraded to Notes 8 or 8.5 they can then complete the exercises and demonstrations.

**Interactive Student Activities** - A student activity is combined with almost every lesson. This learning model provides immediate reinforcement of the important points or procedures in the lesson and maximizes retention. TLCC's Notes user courses contain three types of activities:

- Practice Activities allow a student to practice what was learned to provide immediate reinforcement.
- Setup Activities allow a student to customize their personal Notes setup after learning about a setup option. The student not only learns the Notes client, but also starts to customize it for their own needs as they go through the course. An example of a setup activity is enabling an automatic signature for mail.
- Learning Buddy Activities involve another student to reinforce concepts related to collaborative activities such as mail, group scheduling, and group To Do's.

These integrated activities provide immediate reinforcement of what was learned and get the student started towards setting up their Notes 8 client.

**Provide support to students** - TLCC's user courses include a Discussion database which takes advantage of Domino's proven collaboration capabilities. The course Discussion database allows students to post questions linked to the lessons in the course. The Discussion database provides a communication link between your user support team and the students as they are taking the course. The advantages of providing course discussion monitoring and support are:

- Allow you to provide individual and specific student support.
- Students can get help and do not feel they have nowhere to turn to if they are "lost."
- Provide immediate feedback during the rollout and training phases of your project.
- Students can learn from other students' questions and answers.
- Reduce calls to the Help Desk

**Easy to deploy** - Students take TLCC's courses using a Notes client. The course can be accessed from a Domino server or can be replicated to the student's computer and taken locally. Mobile and remote users can take the course locally without using expensive and/or slow connections to a Domino server. This wide flexibility of access options accommodates different company and student needs. There are several options to start students with the course. One option is to send an e-mail with a link or button that will take the student to the course to get started. Another option is to add the course links to a custom corporate welcome page. Remote users with slow connections can be sent the course databases on CD and can then copy the databases to their hard drive and use the course locally.

**Pick the course needed** - TLCC's user course site license includes access to the following: courses for Notes and Domino 8:

- **Notes 6 to 8 User Update** - This course is for Notes 6/6.5 users moving to the Notes 8 Standard configuration client. The course concentrates on what is new in Notes 8 so the

student can quickly learn the differences between Notes 6/6.5 and Notes 8 and how to take advantage of the new features.

- Notes 7 to 8 User Update** - This course is for Notes 7 users moving to the Notes 8 Standard configuration client. This course covers the changes and differences between Notes 7 and the Notes 8 client.
- Using the Notes 8 Standard Client** - This course is for users who have never used Notes before, and who will be using the Notes 8 Standard configuration client. The course covers using the Notes 8 features like mail, calendar and scheduling, using databases, searching for information and much more!
- Using the Notes 8 Basic Client** - This course is for users who have never used Notes before, and who will be using the Notes 8 Basic configuration client. The course covers using the Notes 8 features like mail, calendar and scheduling, using databases, searching for information and much more!
- Using Domino Web Access 8** - This course covers how to use Domino Web Access 8 to access Domino mail, calendar and contacts.

And the following courses for Notes 8.5 and iNotes:

- Notes 6 to 8.5 User Update** - This course is for Notes 6/6.5 users moving to the Notes 8.5 Standard configuration client. The course concentrates on what is new in Notes 8.5 so the student can quickly learn the differences between Notes 6/6.5 and Notes 8.5 and how to take advantage of the new features.
- Notes 7 to 8.5 User Update** - This course is for Notes 7 users moving to the Notes 8.5 Standard configuration client. This course covers the changes and differences between Notes 7 and the Notes 8.5 client.
- Using the Notes 8.5 Standard Client** - This course is for users who have never used Notes before, and who will be using the Notes 8.5 Standard configuration client. The course covers using the Notes 8.5 features like mail, calendar and scheduling, using databases, searching for information and much more!
- Using the Notes 8.5 Basic Client** - This course is for users who have never used Notes before, and who will be using the Notes 8.5 Basic configuration client. The course covers using the Notes 8.5 features like mail, calendar and scheduling, using databases, searching for information and much more!
- Using iNotes 8.5** - This course covers how to use iNotes 8.5 to access Domino mail, calendar and contacts.

This allows an organization to select the appropriate course for each user. If users are upgrading from a previous version of Notes they should take the appropriate update course. Users new to Notes should take the *Using Notes 8 or 8.5 Standard Client* course. This allows an organization to offer the right course for each user. Other Notes training courses require that an organization purchase separate licenses for each course. All the TLCC User courses are included in the single low site license fee.

**Testing of Students** - Each lesson module includes a self-assessment quiz consisting of Multiple Choice and True/False questions. For each question, the student can display the correct answer and compare their response. Self-assessments provide immediate feedback, allowing the student



to assess their understanding of material presented in the current course module. An optional final exam can be enabled to test each student on comprehension of the material or to ensure compliance with mandatory course completion policies. Detailed exam summary results are posted in the Exams database. This allows an administrator to identify students who may require additional training.

## **Deployment Considerations**

Below are the suggested steps for deployment of TLCC's Notes based user training courses. These steps would typically be accomplished by the Notes/Domino administrator:

### **1) Create course on a Notes workstation**

Download the course from TLCC's web site to a Notes client. Detach the course files from the course setup database. There are three databases for each course.

- Lessons - this database contains the actual lessons for the course
- Discussions - this database is where the students will interact with the course mentors/instructors to ask questions
- Exams - this database holds the final exams for all the students. Students will only be able to create an exam. The administrators/instructors will be able to see the exam results for all the students

Create a non-replica copy of the course files on the local Notes client to avoid corruption of course content from inter-company replication. Many companies that use Notes and Domino technology replicate databases with other companies. If you do not create non-replica copies, it could be possible that your organization could replicate course customization with another organization using this course material. This is not possible when you create non-replica copies of the course databases. All course databases must be placed in the same file path and they must retain their original file names. The course databases can be placed anywhere in your Notes data path. You can also create different instances of the course for different groups of users. For example, you could have an "office" and "mobile" version of this course, each customized to suit the needs of the different groups of Notes users.

### **2) Review Course Material**

Review the course material to ensure that all the topics covered apply to your user population. For example, the lessons on mobile users may not apply if you do not have any mobile users. See step 4 for customization details.

### **3) Optional - Disable Final Exam**

Decide if you want students to take the final exam for the course. Initially the final exam is enabled for the course, but you can choose to disable the exam by removing it from the Lessons database. The exam uses a subset of the same questions that are asked in the self-assessments found at the end of each module. Each student who takes the exam is asked 20 questions in random order. Upon completing and submitting their exam, students are immediately notified of their score. Detailed exam summary results are posted in the Exams database, available only to the Exam Administrator(s) that were allowed access. The Final

Exam is available by default, however, the following considerations are reasons why you may want to disable the exam.

- For some students, any form of a monitored exam will generate stress.
- Have the target students been tested with this type of exam in the past? Did prior testing produce overall positive results?
- Is there a measurable payback for including the final exam?
- A final exam may not be appropriate for a one day user training course.

The final exam is disabled by simply deleting the final exam document in the Lessons database.

#### 4) **Customize course content if desired**

The course can be easily customized to remove content by simply deleting the lessons not applicable to your users (or that group of users who will take an instance of the course.) Lessons can also be edited to change the content. New lessons can be added to support custom applications within your organization.

#### 5) **Setup Course Access Control List**

The TLCC instructions will include recommended ACL settings for each of the three course databases.

#### 6) **Create replica copies of the course on the Domino servers**

After customizing the course material (optional) and setting the ACL for the course databases, you are ready to distribute the course to your Domino servers. This is done with the same techniques and procedures used to deploy other Domino applications. You create a replica copy of the three course files on all Domino servers where users will access the course material. Consider the following when deploying the course on your Domino servers:

- Will the course be accessed on one or several servers? Since the course will be accessed by Notes users throughout the organization, it is recommended that you deploy it on the Domino servers which deliver organization-wide applications.
- The course databases do not consume a lot of space. Initially, they are less than 15 MB. The Discussion database will grow based on the quantity of students and the level of participation. When the Final Exam is enabled, the Exams database will grow based on the number of submitted exams (approximately 4 kbytes per submitted exam).
- When accessed by mobile and remote users, the course databases should be deployed on Domino servers which provide access to these users.
- The three course databases must be in the same directory path on the Domino server or Notes client.
- As with all Domino applications, A Domino Administrator with the appropriate "Create Replica" privileges must initiate the creation of the course replicas on the Domino servers.

- When deploying to several Domino servers it is recommended that you use the Administration Process to create the course replicas.

#### 7) **Notify the students so they can start the course**

There are several methods to notify users about this course and provide easy navigation to it from their workstations. Some course notification and access techniques are:

- Send e-mail notification with a link or button to take the user to the course to get started.
- Create a custom corporate welcome page that includes a link to the course
- Use User Setup Profiles to automatically add bookmarks to the user's client and to create local replicas on the user's workstation

At its core, the course is just another Notes application. The method (or mix of methods) that your organization uses should be influenced by how you currently deploy other Notes applications.

#### 8) **Monitor the Course Discussions**

TLCC's user courses includes a Discussion database which takes advantage of Domino's proven communications and collaboration capabilities. The course discussion database allows a student to post course related questions. The Discussion database uses a familiar threaded discussion format which is intuitive and easy to use. The help in the course describes how to post questions and review course related discussions. A successful course discussion database can significantly improve your student's learning and use of their Notes 6 client systems. This can pay large dividends in increased productivity and reduced ongoing support costs. The success of your course discussion database will very much depend on the level of staffing and ownership that your organization invests. Students should be encouraged to post questions in the course Discussion database and a support plan put into place to allow for timely responses. In a well supported course discussion database, students should expect answers to their questions within one business day. An optional agent can be enabled to allow the instructors to get an email whenever a new post has been added to the discussions database.

A button can be enabled to allow students to chat with instructors using Sametime Instant Messaging. This button is available in the lessons form and also on all discussion forms. The feature requires an Instant Messaging (Sametime) server.

If desired, the course discussions database can be disabled and not used.

### **Tips and Suggestions for Successful Learning**

Below are some successful strategies employed by TLCC's customers to ensure a successful rollout of Notes training:

**Use a blended approach** - One firm has used a combination of classroom training and Notes based training. They first require new employees to attend an in-house class for four hours. In this class they use TLCC's user course to introduce the Notes client. At the end of the class the user is permitted to get the new Notes client installed. The class also teaches the user how to

access the course so the user can continue their Notes training and use the course as a reference. This approach has been very successful in getting the users up and running with the Notes client. The course gives them a place to go to learn more about Notes and the integrated discussions

**Require training before the Notes 8 installation** - Many organizations require that the user have training before a new version of Notes is installed on their workstation. TLCC's user courses will work on a Notes 6 or Notes 7 client to facilitate this approach. The final exam can be used to determine if the user has completed the training.

**Send email with a link to the training course after the client is upgraded** - An email can be sent to the users to get them started with the course. A button, doclink, or hotspot can be used to link to the lessons database.

**Add bookmark for training course to Notes 8 bookmarks as part of installation** - Notes supports the automatic creation of a bookmark. This is setup in the Domino Directory in the Policies document. A bookmark can be created as part of a policy so that when the user is setup or when the user logs in the next time the bookmark will appear on their Notes workstation.

**Training Link on Welcome page** - Custom Corporate Welcome pages can be setup as a policy which will then apply that Welcome Page to all users' workstations. A "Training for Notes" button, link, or hotspot can then be added to the corporate welcome page to allow the users easy access to the training courses.

### **Summary**

Training is critical to a successful Notes rollout. It reduces Help Desk calls and maximizes the investment made in Lotus Notes. Notes based training from TLCC is the best way to offer cost effective user training for Notes.

## Appendix A

### Description of Courses

#### *Using the Notes 8 Standard Client*

The *Using Notes 8 Standard Client* course is designed to teach Notes 8 to new Notes users who will be using the new Eclipse-based client (Standard client.) Students will learn about the new Notes user interface controls and the basic elements found in all Notes applications. This course provides detailed coverage of the Notes Mail, Calendar, To Do List applications, Notes editing features, Notes searching features, and the many useful Internet integration features available in Notes. They will also learn how to customize and personalize Notes to the way they work. The course includes many integrated, hands-on practice and setup activities to reinforce the student' learning and provide immediate feedback. For additional feedback, each course module includes a self-assessment quiz and there is a final exam.

#### **Outline - Using Notes 8 Standard Client**

The course is organized into thirteen modules. A summary of the information in each module follows:

##### **Module 1 - Introducing Notes**

This module introduces Notes and Notes applications. Learn how to start, exit, and lock Notes.

##### **Module 2 - Notes User Interface Controls**

This module provides details for the main user interface controls available in Notes. Learn how to use the home page, window tab bar, bookmarks, navigation buttons, toolbars, status bar, menus, and action buttons.

##### **Module 3 - Notes Applications**

This module introduces the main components of a Notes application. It outlines the basic skills required when working with any Notes application. In addition, this module details and demonstrates procedures for working with applications, views, and documents.

##### **Module 4 - Notes Editing Features**

This module describes the rich text editing features available in Notes, including the text highlighter feature, the permanent pen feature, lists, attachments, and links.

##### **Module 5 - Notes Mail and Contacts**

This module describes how to use the Notes mail and Contacts applications.

##### **Module 6 - Notes Calendar and Meetings**

This module describes how to use the Notes Calendar application.

##### **Module 7 - Managing Your To Do List**

This module describes how to use the Notes To Do list application.

##### **Module 8 - Customizing and Personalizing Notes**

Notes offers many options for customizing it to the way you work. This module describes many of these options so you can take advantage of them.

##### **Module 9 - Searching with Notes**

Notes offers many powerful searching capabilities. This module focuses on various techniques for searching in Notes.

##### **Module 10 - Other Notes Features**

Other features of Notes are explored in this module.

##### **Module 11 - Advanced Notes Editing Features**

This module describes the advanced rich text editing features available in Notes, including sections, rules, hotspots, tables, and pictures.

### **Module 12 - Advanced Notes Mail Topics**

This module covers advanced Notes mail topics including recalling a sent message, creating and using stationery, filtering incoming mail, archiving mail, delegating access to your mail and using Notes Instant Messaging.

### **Module 13 - Notes Mobile and Remote Support**

This module describes how to take advantage of Notes' mobile and remote support. If you are not a mobile user or you do not replicate local databases, then you can skip this material.

## *Using the Notes 8 (or 8.5) Basic Client*

This course is designed to teach the Notes Release 8 Basic client to new Notes users. This course will prepare the student to use the **Notes 8 Basic client**. They will learn about the Notes user interface controls and the basic elements found in all Notes applications. This course provides detailed coverage of the Notes Mail, Calendar, and To Do List applications. Students learn about Notes editing features, Notes searching features, and the many useful Internet integration features available in Notes. They also learn how to customize and personalize Notes to the way you work.

The course includes many integrated, hands-on practice and setup activities to reinforce learning and provide immediate feedback. For additional feedback, each course module includes a self-assessment quiz and an optional final exam.

### **Outline - Using Notes 8 Basic Client**

#### **Module 1 - Introducing Notes**

This module introduces Notes and Notes applications. Learn how to start, exit, and lock Notes.

#### **Module 2 - Notes User Interface Controls**

This module provides details for the main user interface controls available in Notes. Learn how to use the home page, window tab bar, bookmarks, navigation buttons, toolbars, status bar, menus, and action buttons.

#### **Module 3 - Notes Applications**

This module introduces the main components of a Notes application. It outlines the basic skills required when working with any Notes application. In addition, this module details and demonstrates procedures for working with applications, views, and documents.

#### **Module 4 - Notes Editing Features**

This module describes the rich text editing features available in Notes, including the text highlighter feature, the permanent pen feature, lists, attachments, and links.

#### **Module 5 - Notes Mail and Contacts**

This module describes how to use the Notes mail and Contacts applications.

#### **Module 6 - Notes Calendar and Meetings**

This module describes how to use the Notes Calendar application.

#### **Module 7 - Managing Your To Do List**

This module describes how to use the Notes To Do list application.

#### **Module 8 - Customizing and Personalizing Notes**

Notes offers many options for customizing it to the way you work. This module describes many of these options so you can take advantage of them.

#### **Module 9 - Searching with Notes**

Notes offers many powerful searching capabilities. This module focuses on various techniques for searching in Notes.

#### **Module 10 - Surfing with Notes**

Notes provides a full set of Internet integration features. This module reviews the Notes/Internet integration features, including how to use web robots to surf off-line and get notifications when a web page changes.

**Module 11 - Advanced Notes Editing Features**

This module describes the advanced rich text editing features available in Notes, including sections, rules, hotspots, tables, and pictures.

**Module 12 - Advanced Notes Mail Topics**

This module covers advanced Notes mail topics including recalling a sent message, creating and using stationery, filtering incoming mail, archiving mail, delegating access to your mail and using Notes Instant Messaging.

**Module 13 - Notes Mobile and Remote Support**

This module describes how to take advantage of Notes' mobile and remote support. mobile users or those who do not replicate local databases can skip this material (the course can be customized to remove this module.)

*Notes 6 to 8 (or 8.5) User Update*

This course is for Notes 6 users moving to the Notes 8 Standard client. The course concentrates on what changes a student will find as they move from Notes 6 to Notes 8 so the student can quickly learn the differences between Notes 6 and Notes 8 and how to take advantage of the new features.

*Outline - Notes 6 to 8 User Update***Module 1 - Notes 8 Introduction**

This module introduces the new features of Notes 8. Learn the new terminology used in Notes 8 and about enhancements to Notes 8 Help.

**Module 2 - Notes 8 Look and Feel**

This module describes the new features of the Notes 8 user interface.

**Module 3 - Notes 8 Mail**

This module describes the new features and changes in Notes 8 Mail.

**Module 4 - Notes 8 Calendar**

This module describes the new features and other changes in the Notes 8 Calendar application.

**Module 5 - Other New Notes 8 Features**

This module describes other enhancements introduced in Notes 8 such as enhancements to working offline and viewing a collaboration history.

*Notes 7 to 8 (or 8.5) User Update*

The *Notes 7 to 8 User Update* course is designed for Notes 7 users who are upgrading to the Notes 8 Standard client. The course concentrates on what is new in Notes 8 so the student can quickly learn the differences between Release 7 and Notes 8 and how to take advantage of the new features. The course includes many integrated, hands-on practice and setup activities to reinforce your learning and provide you with immediate feedback. For additional feedback, each course module includes a self-assessment quiz and there is a final exam.

*Outline - Notes 7 to 8 User Update***Module 1 - Notes 8 Introduction**

This module introduces the new features of Notes 8. Learn the new terminology used in Notes 8 and about enhancements to Notes 8 Help.

**Module 2 - Notes 8 Look and Feel**

This module describes the new features of the Notes 8 user interface.

**Module 3 - Notes 8 Mail**

This module describes the new features and changes in Notes 8 Mail.

**Module 4 - Notes 8 Calendar**

This module describes the new features and other changes in the Notes 8 Calendar application.

**Module 5 - Other New Notes 8 Features**

This module describes other enhancements introduced in Notes 8 such as enhancements to working offline and viewing a collaboration history.

### ***Domino Web Access 8 (or Using iNotes 8.5)***

This course will prepare you to use Domino Web Access 8. The course provides detailed coverage of the Mail, Contacts, Calendar, To Do and Notebook functions in the Domino Web Access application. You will also learn how to customize and personalize Domino Web Access to the way you work.

The course includes many hands-on practice and setup activities to reinforce your learning and provide you with immediate feedback. For additional feedback, each course module includes a self-assessment quiz.

#### ***Outline - Domino Web Access 8***

##### **Module 1 - Introducing Domino Web Access**

This module introduces Domino Web Access and Domino Web Access applications. It provides detailed coverage of the logon and logout procedures, customizing Domino Web Access, and using instant messaging.

##### **Module 2 - Using Mail**

This module introduces and describes how to use the Domino Web Access mail function.

##### **Module 3 - Managing Contacts**

This module describes managing your contacts in Domino Web Access.

##### **Module 4 - Calendar and Meetings**

This module describes the use of the Domino Web Access Calendar.

##### **Module 5 - Managing Your To Do List**

This module describes the use of the Domino Web Access To Do list.

##### **Module 6 - Using Rich Text Editing Features and the Notebook**

This module describes the rich text editing features available in Domino Web Access and the use of the integrated Notebook for creating documents.

##### **Module 7 - Other Features of Domino Web Access**

Other useful features of Domino Web Access are covered in this module, including searching, enabling the out-of-office agent, delegating access and working off-line.



## Appendix B - Case Studies of User Training

### Orica

Orica is a publicly owned Australian chemical company employing over 9,000 staff across approximately 30 countries and with revenue of \$AUD4 billion annually. Headquartered in Melbourne Australia, the Orica businesses – Orica Mining Services, Fertilizers (Incitec Pivot Limited), Orica Chemicals and Orica Consumer Products – are all leaders in their chosen markets. Orica manufacture and supplies industrial and specialty chemicals, agricultural chemicals and fertilizers, commercial explosives and mining chemicals, paints and other consumer products. Orica is the largest chemical company in the Asia Pacific region. Orica Mining Services is the world's leading supplier of commercial explosives, a global business with a leading presence in Australia, Asia, Europe, North America and Latin America. Orica's i-kon™ electronic detonator is widely recognized as the world's most sophisticated blast initiator.

Orica has been a Notes user since the release of R3. SAP and Notes are the primary application development platforms at Orica. Notes is used for document management, discussion databases, and many custom applications for business processes. Globally there are 72 Domino servers, with a Domino server at all large sites.

In Australia, Orica employ 8 Notes support staff across administration, infrastructure and application support functions. Application development is performed by a mixture of in-house developers and business partners. Company wide, Orica uses over 900 custom Domino databases. Application monitoring allows Orica to retire applications no longer in use.. All employees who use a PC get a Notes user ID.

One of the issues Orica faces is the remoteness of many of their operations. In many regions, communications costs can be very high, so Orica uses Notes Domino replication to place databases right on the local server . Remote users who do not work in an office with a server have local database replicas to also help cut down on communication time/costs.

Orica started their migration by moving the servers to Domino 6 first. Servers were replaced with new hardware and a new server OS. The new servers were all delivered with TLCC's user training courses. . The users were migrated next, R4.6 to Notes 6. Currently Orica has completed the user migration for the Australian employees, approximately 3,500 users.

The benefits of quality training for users has always been important to Orica. When it came time to plan for user training on Notes 6, Orica considered creating an in-house course, as it had done for previous Notes implementations. While Orica had the resources to create the training they decided that they could buy a course for far less than their in-house training department could create one. Orica's search for Notes user training ended with the discovery of The Learning Continuum Company (TLCC.)

TLCC's user courses were perfect for Orica's needs. The course was customizable. This let Orica modify the lessons to fit the way they operated. Since Orica's employees were migrating from Notes 4 the TLCC Using Notes 6 course was used. Orica has made some modifications to

the standard mail template used in Notes 6. They were able to customize the course to match the changes they had made to the mail template. They also changed the lessons to fit certain procedures they use. It was much easier and more cost-effective to quickly modify TLCC's user course than to create a new course from scratch. Michael Jerkovic, Messaging Product Manager, said "TLCC's user course are much better than the previous in-house training efforts. The graphics and presentation of the material are very good."

TLCC's user course was installed on all the Domino 6 servers. Laptop users got a local replica of the course installed on their laptop when Notes 6 was installed. Employees at offices without a Domino server also got a local replica of the course. This cut down on communication costs.

Orica required every employee to attend a 1.5 hour seminar presented by the training department before the employee got upgraded to Notes 6. In this training session Notes 6 was introduced along with TLCC's training course. Each employee got a 40 page booklet that referred them back to the TLCC user course for further detailed instructions. Orica also has a standard corporate help (SOE) database that employees use to get help on Orica's' IT systems and procedures. This help database was modified to include links to the TLCC user course for those topics that matched up such as creating a memo or replicating. Users can do the final exam in the course if they want to test themselves. Orica does not require employees to pass this exam and does not track the results.

The response to the Notes 6 user course has been very positive. The training department is happy because they are able to deliver training at a fraction of the cost of in-house efforts. The IT department was able to easily adopt the course to their needs. Having a training course in a Domino database is a great benefit. This allows Orica to take advantage of Domino 6's replication and to easily customize the course using a Notes client. The feedback from the users has been very positive.

## **Case Study - Milwaukee Electric Tool Corporation**

Milwaukee Electric Tool Corporation is an industry leading manufacturer and marketer of heavy-duty, portable electric power tools and accessories for professional users worldwide. Milwaukee is headquartered in Brookfield, Wisconsin, which is also home to research, new product development, product training, manufacturing support, marketing, sales, human resources and information systems. It has production facilities in six locations in North America. The tools are built in small “cells” in each plant using just-in-time manufacturing techniques to keep inventory at a minimum.

Milwaukee has over 2,000 employees. Approximately 1,000 employees use Notes for e-mail. Notes is more than just e-mail at Milwaukee. It is used for many applications such as expense reporting, customer relationship management (CRM), travel, resource reservations, quality, and human resources. TeamRoom and Sametime are also used. Domino is used for parts of the corporate website. There is one mail server for all the users and a database server. All of the different locations access the Domino servers via the corporate WAN. The sales force uses laptops and replicates many databases locally.

The migration to Notes 6 occurred in the Fall of 2003. Milwaukee migrated the Notes users in phases determined by building. Every two weeks a new building was migrated. First, “super users” were identified in each building and instructed how to migrate to Notes 6. This allowed the super users to gain experience with Notes 6. A side benefit was that the other users saw Notes 6 in action and got excited over the new Notes 6 interface and welcome page. Then the balance of the users in the building were sent an e-mail with the actions required to upgrade to Notes 6. An attached Word document provided more detailed instructions. The users upgraded to Notes 6 by themselves. The users were aware of whom the super users were so they knew who to contact for help. The I.S. Help Desk also provided support if problems were encountered.

The same philosophy used on the plant floor is also used for corporate training at Milwaukee according to Anne Winter, a Learning and Development Analyst at Milwaukee. “When it came time to train the users on Notes 6 we wanted a solution that allowed the users to learn tasks as needed.” TLCC’s Notes 6 user courses were chosen because they provided the modular approach needed to allow the users just-in-time training. Milwaukee placed both the Using Notes 6 and the R5 to Notes 6 User Update courses on their mail server. The courses were slightly modified to fit their needs by removing some of the lessons on topics not used in Milwaukee’s environment. The e-mail with instructions on how to upgrade to Notes 6 included instructions and links to access the TLCC user courses. Remote sales people were sent a CD with the training courses on it so they could take the course without having to be connected to access the training course.

The Help Desk was instructed to not repeat information which was included in the training courses if users called with questions. Instead, they sent the users doclinks to the relevant course lessons in the TLCC user course. The new Notes 6 feature, “Copy Selected as Table” was used to create a table showing the name of the lesson and a doclink to that lesson. The super users were also instructed to show users how to access the course if they had questions on how to use

Notes 6. The Help Desk personnel really liked the training courses as a support tool. It saved a significant amount of time when responding to questions and allowed the Help Desk personnel to focus on real support issues instead of providing ad-hoc training.

The discussions database in the courses was not used. The Final Exam was enabled but Milwaukee did not do any tracking of the exam results. The corporate philosophy is that training is highly encouraged by is not required. After the upgrade was completed a log report was run showing 15-20% of the users took the entire course and 50% of the users did at least part of the Notes 6 course. The feedback from the users was excellent. They like the ability to zero right in on a lesson that shows them how to accomplish a task. Many users search the course lessons database to find lessons with certain keywords that describe what they are trying to do. The relevant lessons are then listed allowing the users to receive just-in-time training. The course is still used as a reference many months after all the users were upgraded to Notes 6. New employees are instructed by their managers and the Help Desk to take the user course to learn how to use Notes 6.

TLCC's user courses provided Milwaukee with the just-in-time training needed to smoothly migrate to Notes 6 and take full advantage of this new platform.

## Case Study - Erb Group of Companies

Erb Group, with operations in Canada and the U.S., specializes in temperature controlling freight. Headquartered in New Hamburg, Ontario, they have over 1,000 employees and over 650 trucks.

There are 200 Notes users with one AS/400 Domino 6 server. The users are in eleven different locations. They are connected via a wide area network. Most users use Notes for mail only. Erb does maintain many corporate documents in Notes for easy access. The majority of the users are on the Notes 6 clients but a few still use R5.

Vic Thiessen, Erb's Vice President of I.S., chose TLCC's user courses in order to provide more formal Notes training. Before getting the courses most users received informal training delivered by the members of the I.S. team. This required I.S. Department resources. Erb deployed TLCC's user course on the Domino server. Each user got a bookmark to the course added to their desktop. The plan is to have each user get a quick 1/2 hour course in how to use the TLCC Notes 6 user course. This allows the user to understand how to take the course and use it as a knowledgebase after they return to their office.

Currently the TLCC user course is only used in the main corporate office. The remainder of the users will be trained by the I.S. staff using laptops to enable a traveling classroom. Erb does not use the course discussions. The Final Exam is enabled and Vic has put an incentive in place to encourage the users to take the course. He offered an entry into a drawing to win a prize if the users complete the exam. Vic found that some users were intimidated by the idea of being tested.

Overall, the TLCC user training has been very helpful to Erb. It allows their users to get more in-depth with Notes. Vic noted that some users did not even know how to create folders but using the course he was easily able to point them to the procedure to use folders in their mail.