

**iQ.Suite ClientAdmin**  
(powered by panagenda MarvelClient)

*Selected  
Business  
Cases*

 **GROUP**

*Think Lotus Think GROUP*

 **panagenda**

## Contents

Figures and Tables.....	3
About this document.....	4
Non-technical summary.....	4
Technical summary .....	6
Selected Customers .....	7
About MarvelClient - introduction.....	7
Client Management approaches.....	8
Client Management „on demand” .....	8
Client Management „90% is enough“ .....	9
The solution: Client Management well thought-out .....	9
The key requirements for well thought-out client management.....	10
Transparency .....	10
Adaptability .....	11
Reliability/Predictability and Flexibility .....	13
Performance/Scalability.....	14
Timesaving.....	15
Costsaving .....	15
Business Cases.....	16
Upgrading Notes Clients .....	16
General Client Configuration .....	19
Domain Changes .....	19
Certifier Changes, Server / Database Moves .....	21
Data Directory on Network Drives (not just Citrix).....	22
Roaming.....	23
Citrix.....	23
Travelling users.....	24
Upper Management.....	25
"One" last word.....	26
About GROUP Business Software.....	27

## Figures and Tables

FIGURE 1 - PROBLEM SOLVING PATTERN WITH "ON DEMAND" CLIENT MANAGEMENT .....	8
FIGURE 2 - PROBLEM SOLVING PATTERN WITH CLIENT MANAGEMENT WELL THOUGHT-OUT .....	10
FIGURE 3 - VIEWS IN THE MARVELCLIENT ANALYSE DATABASE .....	11
FIGURE 4 - RESTRICTING AN ACTION TO CLIENT ATTRIBUTES .....	12
FIGURE 5 - OPTIONS FOR MANAGING A DESKTOP ICON (ABSTRACT) .....	13
FIGURE 6 - OPTIONS FOR MANAGING A REPLICA ALONG WITH A DESKTOP ICON .....	14
FIGURE 7 - EXAMPLE ROI CALCULATION SUMMARY FOR A MID-SIZED COMPANY .....	15
FIGURE 8 - HOW CLIENTS ARE INSTALLED (ABSTRACT) .....	16
FIGURE 9 - UPGRADES WITH JUST 5 DOCUMENTS .....	18
FIGURE 10 - MAIL DOMAIN VS. CERTIFIER .....	20
FIGURE 11 - "THE MAIL DOMAIN CHANGE"-ACTION .....	20
FIGURE 12 - AN INSTRUCTION TO REPOINT LINKS TO A SPECIFIC REPLICA .....	21
FIGURE 13 - EXAMPLE OF AN ACTION FLANKING SERVER-SIDE RECERTIFICATION .....	22
FIGURE 14 - DISALLOW CREATION/DELETION OF LOCAL DATABASES .....	24

## About this document

This document describes selected business cases - and how panagenda MarvelClient can significantly help reduce the workload (=costs) - related to operating a Lotus Notes client infrastructure, be it on a daily basis or flanking larger projects.

Since many client-side management challenges tie in with changes on the server-side (Lotus Domino), this document is of interest for both members of staff working on Lotus Notes *and* Lotus Domino:

- Lotus Notes client support staff
- Lotus Domino administrators
- IT-Managers

In part, this document may also be of interest for professionals in the following areas

- Software deployment
- Network attached storage (NAS/SAN) / "Network drives"
- Citrix

when it comes to initial client deployment and setup/configuration, backup, and roaming.

## Non-technical summary

Imagine how much easier it would be if all your Notes users were able to spend their days using Notes productively – instead of having to stop and call the Notes help desk.

Imagine how much time you'd recover if, instead of answering the same questions over and over, Notes users could have all their client settings configured properly, every time they start Notes.

Imagine how much money you'd save, both in increased productivity and reduced help desk calls, if you could eliminate -- completely eliminate -- 80% or more of support calls.

Now, stop imagining and start marveling, because panagenda's MarvelClient makes all that possible.

Actually, MarvelClient does lots more, but for now, let's focus on the not-so-simple task of keeping thousands of Notes clients running, operating seamlessly, with a consistent user experience for everyone.

**Here's how it works:** The process starts with a tiny DLL that gets pushed to each client computer, a few notes.ini changes and 2 databases residing on your server, that have been configured for your perfect Notes client setup.

At that point, whenever one of your users starts Notes, the MarvelClient DLL automatically checks thousands of configuration details, from where icons are located, to bookmarks, replicator pages, locations, local replicas, locations, toolbars and anything else Notes needs to run right.

If anything isn't configured correctly, MarvelClient acts like a highly-intelligent and automated robotic help desk, self-healing each Notes client configuration and putting everything back where it belongs.

Go ahead and take a minute to marvel what this could mean for your day-to-day tech support load. Can you imagine how many tech support calls that eliminates, and how many others it shortens?

No matter how enthusiastically your users decide to "play" with their Notes configuration, no matter what they move around, the next time they start Notes, it'll all go back to the Notes client setup you configured.

Some users will quickly learn that to fix everything, all they need is to restart Notes. Say goodbye to hundreds of calls – each 5, 10 minutes or longer -- that won't need to get handled anymore.

Other users will need more hand-holding, but rather than asking them to describe the problem, find that menu and read me your screen, all you'll need to do is tell them to restart Notes.

Poof! All back to normal and your users, as well as your support team, can get back to work.

But MarvelClient's self-healing capabilities also bring another benefit to the help desk experience: predictability and persistence. Now you can count on knowing exactly what everyone's Notes client, bookmarks and workspace will look like. You'll save a tremendous amount time – no more guessing what your users see on their screens and no more screen sharing sessions to setup. Training new users on Lotus Notes is a snap too!

For example, if a user can't find their mail icon because they accidentally removed it from the bookmark bar or dragged it somewhere, you'll know you configured MarvelClient to always put the icon top-most on the bookmark bar. A simple client restart will do the trick!

Now take that example and extend it to any Notes application, your corporate time keeping application, your directory catalog, anything, and then extend the self-healing capabilities of MarvelClient to any part of the client, workspace, replicator tab or bookmark bar. But don't stop there as MarvelClient can detect outdated local replicas, delete them, re-create them and adjust the corresponding replicator page to only receive but not send changes, or whatever else you've configured it to be. Marvelous, right?

#### **"Remote" no longer means unsupported**

Regardless of where your users are, on an airplane, remote island – any place off the network, MarvelClient is there to help as the downloaded, self-healing rules do their job on the client machine even when unable to communicate with the users home server. Basically, your users are always one restart away from a completely predictable, reliable and consistent work environment. MarvelClient really is like having a virtual help desk expert at your users side 24/7/365.

#### **Migration without frustration**

Not only is MarvelClient a support life saver, it can also migrate hundreds, thousands, or even more users at the time from one set of servers to another – without support headaches or lost end user productivity.

One customer used MarvelClient to move 140'000 users from 1'300 outdated servers to 90 brand-new one's, all transparent to the users. Can you imagine how much money this company will save on licensing and support costs by taking 1'200 servers out of service?

While IBM provides some tools for moving data from server to server, only MarvelClient give you the ability to transparently manage Notes client references, bookmarks, workspace icons, replicator page entries and local replicas to the right place after they've moved. Everything just works – seamlessly linking to data on the new servers as if nothing happened.

Now when 140,000 users and all their data gets moved and nobody gets upset, that's marvelous! That is MarvelClient.

## Technical summary

panagenda MarvelClient is by far the fastest client management solution for IBM Lotus Notes. Does fastest matter? Yes - being fast is of utmost importance to ensure that users do not call helpdesk when you start to automate many settings and tasks on a daily basis. Do you need client management on a daily basis? Yes, as only the permanent enforcement of all necessary settings leads to a true reduction of help desk calls, respectively smooth, frictionless operations of your Notes client base in synch with whatever changes are made on the server-side and with the needs of your enterprise.

The more you want - if not need - to automate, the more important performance is. And the faster your client management solution is, the more you can automate.

MarvelClient allows for permanent enforcement of desktop icons, bookmarks, welcome pages, replicas, replicator page entries, notes.ini settings, profile documents, and much more across heterogeneous environments comprised of different client releases, platforms, hardware, languages, install flavors and more:

- IBM Lotus Notes 5.x to 8.x in any language and any install type (single/multi-user, single/multi-language, local fixed disc/network drive, basic vs. standard - whereby one single "DLL" automatically adapts your generic configurations to all targeted client(s)).
- Windows NT4SP2, 2000, XP, 2003, Vista, 2008, 7
- Citrix
- Linux
- Mac OS X

To give you a glimpse at how fast MarvelClient is: MarvelClient can enforce up to 200 desktop icons per second and process up to 7,500 mass changes per second in large scale migration/consolidation projects.

## Selected Customers

Panagenda customers, multinational or multiregional companies, typically operate complex IT environments and (as of today) range from 25 up to 140,000 users - the following is a select list of our customers:

<b>3M</b>	<b>Franke</b>	<b>NEC</b>
<b>Aberdeen Asset Management</b>	<b>Fujitsu Siemens</b>	<b>Northumbria Police</b>
<b>AMB Generali</b>	<b>German Military</b>	<b>Nycomed</b>
<b>Arizona Chemical</b>	<b>Groz-Beckert</b>	<b>Office of National Statistics</b>
<b>Banking</b>	<b>Hamamatsu</b>	<b>Olympus</b>
<ul style="list-style-type: none"> <li>■ Raiffeisen</li> <li>■ Volksbanken</li> <li>■ Sparkassen</li> </ul>	<b>ImageNow</b>	<b>Phoenix Contact</b>
<b>Conrad Electronics</b>	<b>Kantonsspital Luzern</b>	<b>Prudential</b>
<b>CiCi's Pizza</b>	<b>Kendle</b>	<b>Shipyarding</b>
<b>D'leteren</b>	<b>LaFarge</b>	<ul style="list-style-type: none"> <li>■ Blohm &amp; Voss</li> <li>■ Leif Högh</li> <li>■ Møgster</li> </ul>
<b>Dyno Nobel</b>	<b>Landeshauptstadt Dresden</b>	<b>Signal Iduna</b>
<b>Evonik</b>	<b>Landesbank Baden-Württemberg</b>	<b>Steria</b>
<b>Finanz-IT</b>	<b>LVM Versicherungen</b>	<b>Thyssen Krupp</b>
<b>First Ukrainian International Bank</b>	<b>MDK Bayern</b>	<b>Underwriter Laboratories</b>
<b>Flowserve</b>	<b>mhplus</b>	<b>Witte Automotive</b>
	<b>MotorCoach</b>	<b>XTO Energy</b>
	<b>N-Ergie</b>	
	<b>Navy Federal Credit Union</b>	

## About MarvelClient - introduction

MarvelClient is a - if not the one - solution for centralized Lotus Notes client management.

Without the appropriate tools, the configuration of the many different parameters and objects in Lotus Notes has always been and remains difficult - if not impossible. Whilst in many areas Lotus Notes / Domino Policies are clearly helpful, for client management they are mostly insufficient.

MarvelClient allows to enforce settings both on-demand (one time), as well as permanently – for certain users, groups, certifiers and/or on clients with specific properties (e.g. Laptop, desktop, Citrix, or IP address).

For permanent actions, there are two further gradations:

Actions that are to be executed often to always at every client start  
(this kind of "self-healing" requires a client restart)

Actions that influence the client behavior for its whole run time (= during the entire client session)  
(Realtime control)

With the help of MarvelClient, significant cost-savings can be achieved: Permanently ensuring that certain problems do not occur at all anymore, and making sure that clients can „heal themselves“ based on locally stored action-sets (even without connection to the enterprise), clearly reduces the number of helpdesk calls.

This leads right to the next topic of how MarvelClient approaches the challenges enterprises face when it comes to managing IBM Lotus Notes clients on a daily basis:

## Client Management approaches

Basically there are three different approaches for client management; many enterprises choose hybrid forms from the following:

### Client Management „on demand“

On Demand client management is the **classic helpdesk-centric** form.

- ➔ If a user calls helpdesk, she/he is being helped.  
If a user calls helpdesk again, she/he is being helped again.
- ➔ Problem solving occurs over and over again; 100 problems = 100 times efforts, no matter what efforts are required to solve a problem or "cure" a symptom.

„On demand“-client management is the most expensive form of client management because of the continuously recurring expenditures.

This client management approach is mostly used due to missing or wrong tools - or because companies only ask for a client management tool which reduces the necessity for helpdesk staff to leave their desk. This leads to the following problem solving pattern, where each and every problem has its own "identify/understand" and "fix" cycle - over and over again:

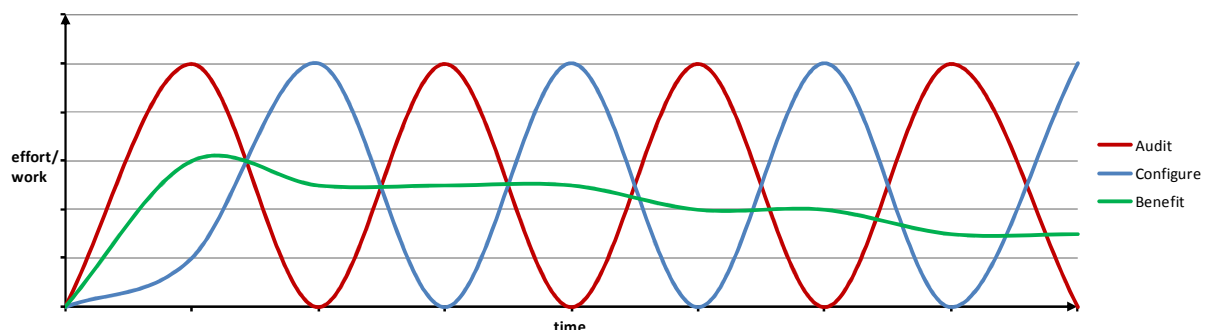


Figure 1 - Problem solving pattern with "on demand" Client Management

Unfortunately, **such tools (comparable to screen sharing / remote management) do not reduce the number of helpdesk calls**, are yet just another tool that needs constant, ongoing operations, and therefore come with a benefit that noticeably declines over time.

## Client Management „90% is enough“

Is it a success if a problem can be solved for "90%" of all users automatically?

No, far from it: According to our experience, the remaining "10%" are responsible for 70+% of the total efforts/expenditures related to client management. By majority, all end users are typically addressed with one "universal solution" (upgrade package, configuration changes, etc.), and the there-from resulting problems are addressed afterwards. This is mostly because problem users/cases cannot be identified upfront (due to the lack of transparency as to who has what) or the "solution" is simply not capable of identifying and handling exceptions - worst case both.

In addition, virtually 100% of all "VIPs" in an enterprise are part of before mentioned "10%". **Frustrated end users, helpdesk staff, administrators and VIPs** are counterproductive when it comes to the general acceptance of a platform - especially when it is much more than just an email platform, as is the case in many companies with IBM Lotus Notes / Domino.

Together, the client management approaches „on demand“ and „90% is enough“, are also the main cause for "Worst Practices" being turned into "Best Practices": Frequent deletion of bookmark.nsf, desktop\*.dsk / ndk, for example, is often used to "solve" client problems (rather: fight symptoms). This however neglects subsequent expenditures, such as users having to recover their thereby lost icons and bookmarks on their own, which clearly takes up more time than the ostensible time profit "gained" from deletion in order to putatively "solve" a problem.

## The solution: Client Management well thought-out

- *Effectiveness= doing the right thing*
- *Efficiency = doing things right*
- *Doing the right things right == key to success*

How would it be if you could solve the majority of your client management problems with a smart solution to 100%, **without subsequent work**?

Admittedly, this requires preliminary work.

However, in contrast to continuous subsequent work, preliminary work is a one-time-effort that pays off multiplicatively and continuously.

Properly pre-thought problem solving can be automated up to permanent problem prevention - compared to all before mentioned client management attempts, this approach clearly is by far the most time- and cost-saving all together, and implicitly **raises productiveness in and acceptance of Lotus Notes / Domino**.

As little as spam emails are filtered manually anymore these days - but rule-based, automatically -, **client management can be automated extensively in a similar fashion as spam-filtering**. Admittedly this requires onetime configuration of a suitable set of actions and rules/conditions - the following graph shows that with MarvelClient, such actions are identified, thought-out and configured once and then significantly reduce subsequent efforts and thereby implicitly also helpdesk calls:

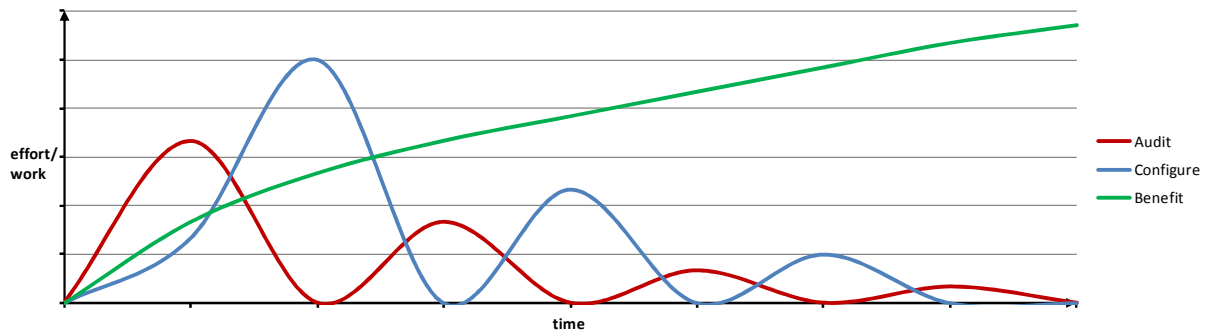


Figure 2 - Problem solving pattern with Client Management well thought-out

**MarvelClient allows for the configuration of adaptable action-sets for permanent, automated client management across 100% of your Lotus Notes users.**

MarvelClient's comprehensive audit of Notes client configurations in combination with its reliable and predictable set of actions makes the essential difference to enable companies to reliably manage 100% of all users efficiently and effectively.

The following chapters document various business cases that MarvelClient addresses. Should a concrete business case not be present which you would like to address, or should its solution not be obvious from the following pages, please contact us.

## The key requirements for well thought-out client management

Well thought-out client management is all about automation - automation which provides clients with self-healing capabilities to **fix many of the problems related to daily operations of IBM Lotus Notes clients automatically** - and for good. Such a degree of automation comes with several requirements:

### Transparency

In order to best manage your Lotus Notes client base, insight into where and how your clients are installed and configured, as well as how they are picking up on your permanent action-sets is a must.

By uploading 25-50 KB at average into a central audit/monitoring database, administrators have full transparency in areas in which the otherwise fly entirely blind.

Information includes various details on the Notes client, operating system, files, directories, desktop icons, bookmarks, replicas, replicator pages, and much more:

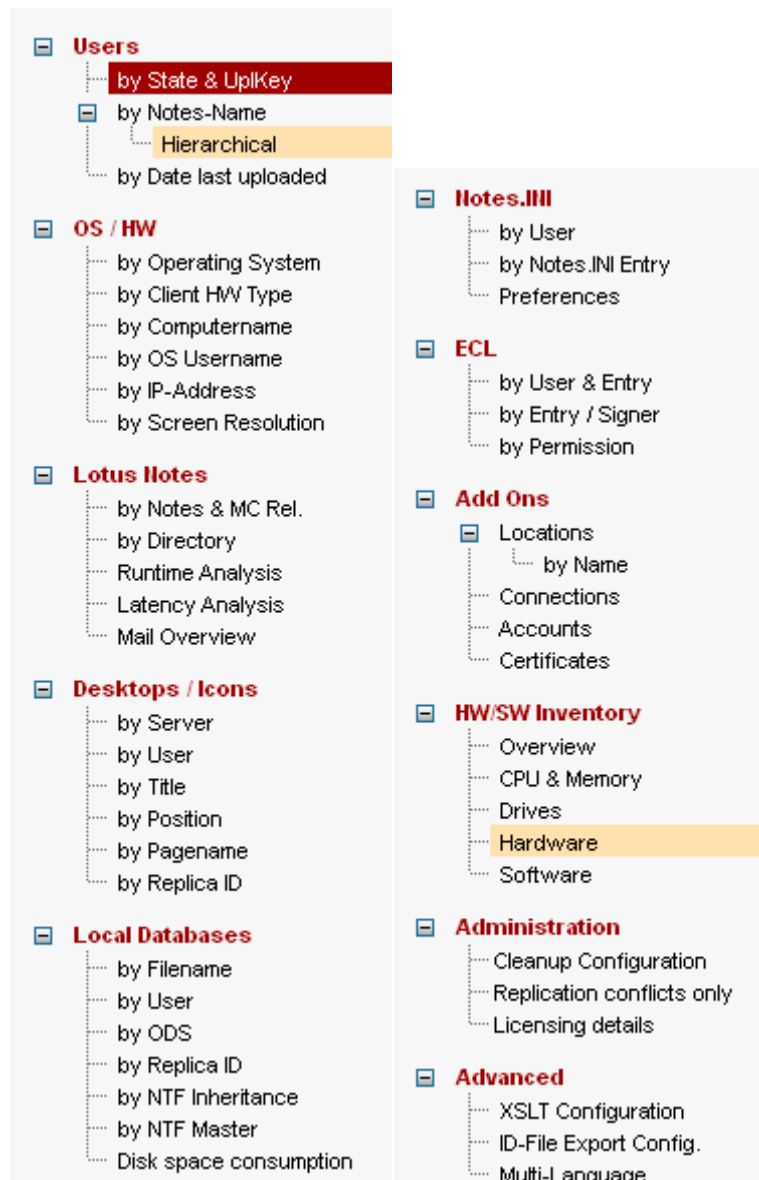


Figure 3 - Views in the MarvelClient Analyse database

## Adaptability

Automatically adapting actions to operating system (Windows, Citrix, Mac OS X, Linux), client release (Notes 5, 6, 7, 8, Basic and standard client, single user, multi-user, single/multi-language, data directory on fixed disk vs. network drive), language of target client (bookmark folder names for example), different client states (replica exists, does not yet exist, should not exist, etc., support of file- and directory-links), hardware (laptop vs. desktop vs. Citrix) is a key requirement for enterprise client management.

The following figure shows an example of how easy it is with MarvelClient to associate an action to all Notes clients release 8 and up on Citrix and desktop clients:

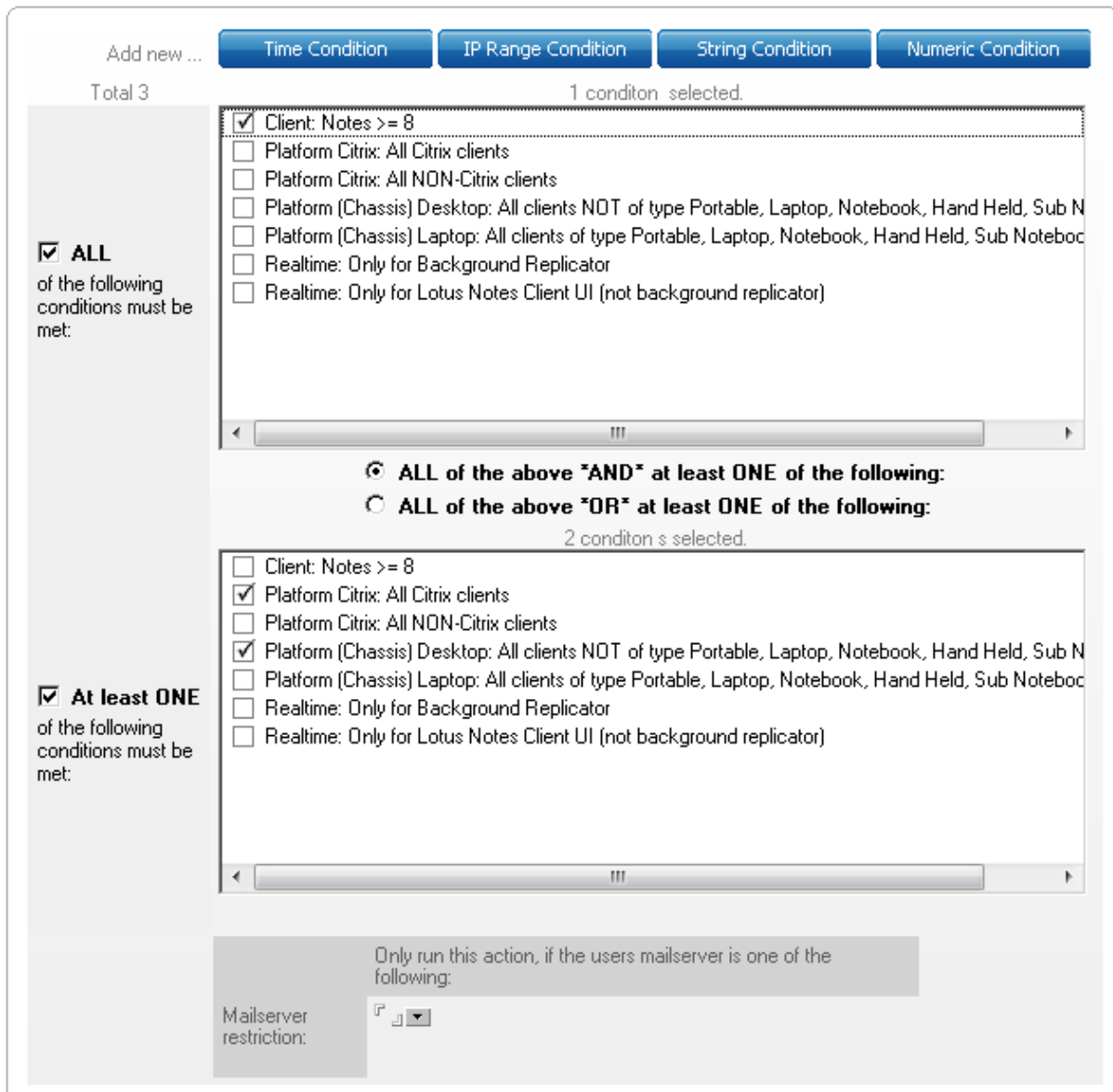


Figure 4 - Restricting an action to client attributes

In many cases it is much more appropriate to associate actions to client attributes rather than groups in the public addressbook - especially since often users have both a Citrix client and a laptop, or multiple Notes releases.

Naturally, you can also restrict actions to specific users, groups, and/or certifiers (\* /Legal for example), as well as again exclude users, groups, and/or certifiers to achieve actions that e.g. run for "all users but the board of management". This can naturally also be combined with client attributes as outlined above.

## Reliability/Predictability and Flexibility

Creating an action that adds each user's mail-file to their desktops and bookmarks (into the "more bookmarks" folder in the respective language), manages a replica along with replicator pages on laptops is more than just one action - it is a set of actions that all automatically adapt to the respective target client and user, and multiply a onetime effort into hundreds if not thousands of solutions. One single document can carry out tens of actions across several (hundred)thousand users.

Given such broadness and flexibility of even just a single action in MarvelClient, configuration of any action requires that one can fully rely on its results - which again needs flexible configuration options:



Figure 5 - Options for managing a desktop icon (abstract)

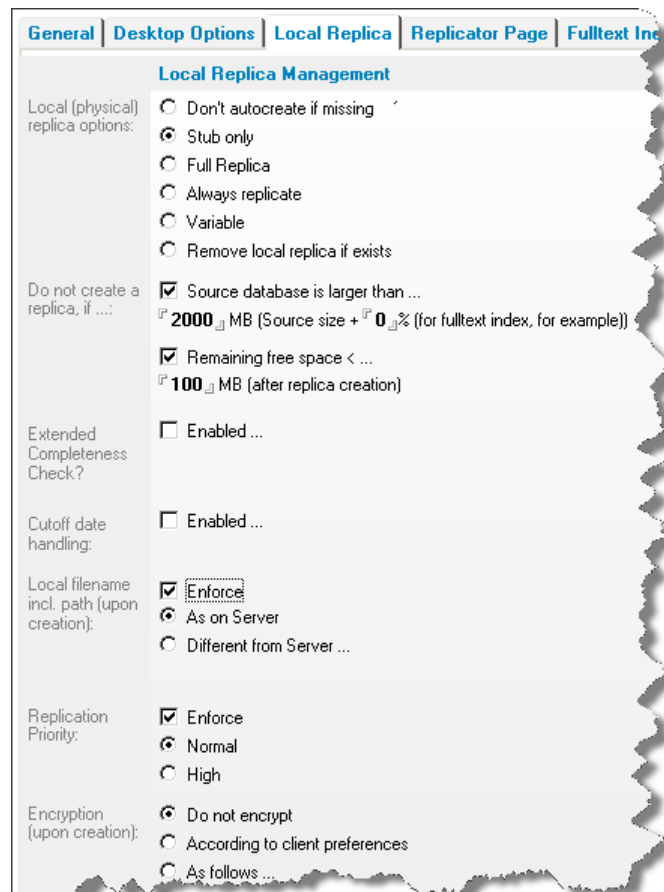


Figure 6 - Options for managing a replica along with a desktop icon

## Performance/Scalability

A key requirement for proper enterprise scalable client management is performance.

(Good) performance guarantees that users do not call helpdesk because whatever challenge one is trying to address takes long to process on each client.

The more one wants to automate, the more important performance is. Enforcing two location documents, 50 icons, 5 replicas, 5 replicator page entries, a few notes.ini entries, a connection document, plus a plugin configuration, already sums up to 70+ actions that need to be enforced at every client startup across desktop, bookmarks, replicas, replicator pages, personal addressbook and more.

panagenda MarvelClient is by far the fastest client management solution for IBM Lotus Notes: MarvelClient can

- manage up to 200 desktop icons per second (across desktops with many more icons)
- process up to 7,500 (seven thousand five hundred, that is) changes in consolidation/migration projects where any database move from one Domino server to another can thereby simply be sent to all clients instead of first having to digest who should get which changes

to name just two of MarvelClient's impressive performance specs.

All actions are carried out in extremely optimized manner: Desktop and bookmarks are only loaded into memory once, matched against all automatically adapted and applicable actions, all relevant actions are processed, and the respective results written back into the corresponding files.

All in all this leads to MarvelClient being the fastest client management solution (typical runtime between 3 and 7 seconds) with the least network traffic involved (typically 2KB download and 25KB upload per client start - configurable for e.g. travelling users with low bandwidth).

## Timesaving

A client management solution must enable administrators to manage as many settings across as many users with as few documents / configuration efforts as possible.

One action must suffice to manage the mail-file on all end user desktops (no matter how many) and automatically adapt to e.g. Laptops, free disk space, and bandwidth.

Also, every action must save as many related helpdesk calls in the future instead of just helping one particular user with one particular problem and configuration only once.

## Costsaving

The result of meeting all of the above requirements - plus, naturally, addressing relevant business cases that enterprises face in daily / yearly Lotus Notes client management - is saving costs.

MarvelClient can reduce the total cost of ownership regarding the operations of IBM Lotus Notes environments to as little as 10% compared to managing and supporting a Lotus Notes environment without MarvelClient (a stressable return on invest calculator is available upon request - where the average ROI is between 2 and 6 months; the larger the environment the better).

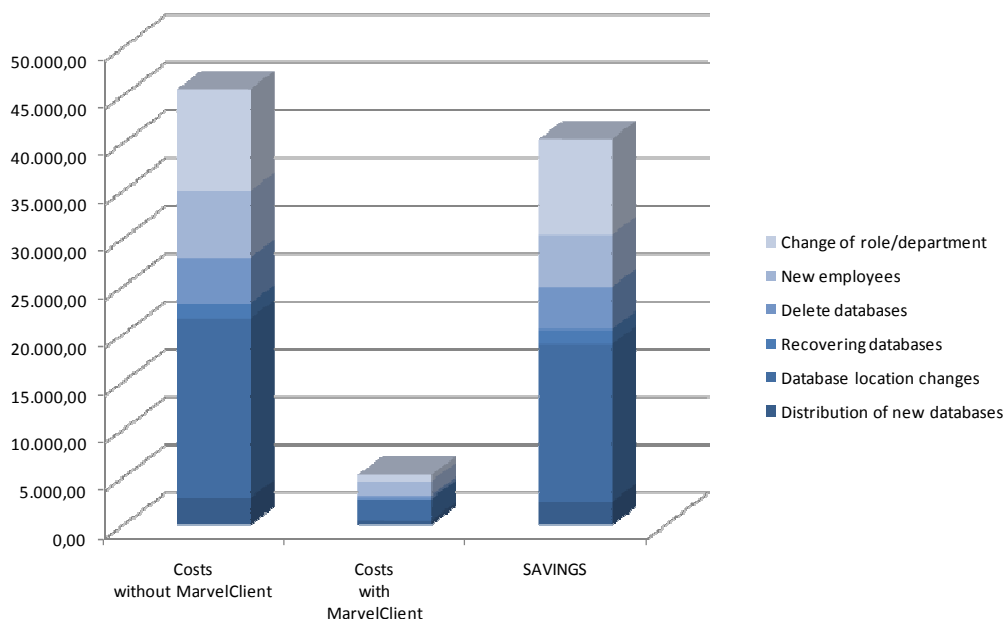


Figure 7 - Example ROI calculation summary for a mid-sized company

## Business Cases

The following chapters describe **selected** business cases that many of our customers have chosen MarvelClient for.

This does not mean that MarvelClient could not address other business cases not (yet) listed on the following pages - so, once again, should a concrete business case not be present which you would like to address, or should its solution not be obvious from the following pages, please contact us.

## Upgrading Notes Clients

Upgrading IBM Lotus Notes clients typically comes with multiple to all of the following four major challenges:

- **Some clients may not correspond to the corporate standard** (be it the release, language, install type (single/multi-user), and/or its directories (program/data)).  
 With MarvelClient, you have full transparency on how your existing client base is installed - the screenshot to the right is an example of looking at how your clients are installed (being just one example out of the many things that MarvelClient can tell you):  
 The fact that some clients are not installed according to corporate standard typically leads to what we call "scripting hell":  
 Due to lack of transparency, a software deployment package does (can) not account for all the different possible installs - at the very best, software deployment can only do a best guess based on registry values or file scanning (or worst case even relying on an unfulfilled corporate standard) but typically misses out on "the unknown" - hence even a best prepared deployment package will fail on a certain percentage of targeted clients.  
 Without MarvelClient, software deployment staff typically has to go through "scripting hell" in order to code for all possible exceptions - which is typically done as the project moves forward: every time end users call help desk that an upgrade has failed, software deployment scripts need to be modified. Even if this is prepared more upfront by means of first identifying all the different install types (diffi-

%	Directory	New?	Date last uploaded	Uplo
33%	▼ [NOTES DATA]			
75%	▼ C:			
63%	▶ Documents and Settings			
28%	▼ Lotus			
11%	▶ Notes			
44%	▶ Notes7			
11%	▶ Notes8			
6%	▶ notes801			
6%	▶ notes802			
6%	▶ notes851			
6%	▶ notes85_gold			
6%	▶ notes85_pb2			
6%	▶ NotesR6			
3%	▶ Program Files			
6%	▶ Users			
12%	▶ d:			
1%	▶ f:			
5%	▶ P:			
2%	▶ Y:			
2%	▶ /home			
2%	▶ /Users			
33%	▼ [NOTES PROGRAM]			
88%	▶ C:			
6%	▶ D:			
1%	▶ g:			
2%	▶ /Applications			
2%	▶ /opt			
33%	▼ [NOTES.INI]			
2%	▼ [elsewhere]			
100%	▶ /Users			
65%	▶ [in Notes Data]			
33%	▶ [in Notes Program]			
100%				

Figure 8 - How clients are installed (abstract)

cult from outside Notes, and still remains cumbersome via mailbox PostOpen scripts or similar in order to collect the vital information), it leads to lengthy install scripts that try to cope for the many "if ... then ... elseif ... then ... elseif ... then ... elseif ... then ... else ..." and so on.

With MarvelClient, you can

- either pass the knowledge *from inside Notes* (that is 100% reliable, not guessed from registry values or similar) to software deployment on which and how clients are installed (it could be multiple and in all sorts of flavors) on each client
- or even directly invoke an upgrade through MarvelClient (not meant as bypassing software deployment, but as an option)

Software deployment can thereby focus on its strengths of deploying software without having to understand IBM Lotus Notes - neither from the outside, nor from the inside. One generic install script takes the reliable information from MarvelClient and does its job - implicitly thereby 100% reliable, too.

■ **"Roaming" the old client configuration into the new client in a clean fashion**

Typically during an upgrade, companies want to get rid of "all the files and settings that have piled up over the years in elder releases", without losing the user's personal settings. Often this leads to companies starting from scratch with clean desktops and bookmarks as they don't know how to best move each users configuration into the new client without "all the dirt".

**MarvelClient can automatically back up an entire client configuration with as little as 2 MB** (4 MB including Eclipse settings), covering

- desktop icons
- bookmarks
- all id files (not just the users current one, but in the Notes data directory and all sub-directories)
- notes.ini (all or a configurable subset)
- personal addressbook
- journal.nsf
- user.dic
- Eclipse settings
- any other files you might need

Mere file copying typically requires 30 times more disk space and also does not migrate the objects into the targeted client; with MarvelClient, the entire client configuration is backed up in generic format which is then again "translated into the targeted client" automatically.

■ **Running the upgrade requires administrator credentials**

Whilst an enterprise software deployment solution usually solves this problem, some companies do not have software deployment or cannot use it for all end users - with MarvelClient you only need to wrap the (un)install into a "runas"-wrapper as provided by IBM (AutoIt for Win-

dows Vista/7) and can then upgrade (or even downgrade) from any Notes release and install type into any other install option and release.

■ **Configuring the new client**

This is usually the greatest challenge when it comes to installing new clients and upgrading existing ones - whilst software deployment tools are good at deploying software, they have little clue - if any clue at all - about the various objects/settings of IBM Lotus Notes.

With MarvelClient, software deployment can simply focus on its strengths and rely on MarvelClient to do all Notes specific configuration/customization immediately upon first client start. All in all, a software deployment package only needs to include MarvelClient and 5 notes.ini settings and nothing more - no more work on names.nsf, bookmark.nsf, replicas, etc. etc. - but simply best of breed:

Software deployment does what it is good at and MarvelClient takes care of the rest.

With MarvelClient it doesn't take more than 5 documents to configure for a touch-less client upgrade from any Notes release and install type into any other Notes release and install-type (e.g. Notes 5 > 8, single > multi-user, Notes 6 > 8, cross platform (e.g. Windows > Linux or Mac), network drive > fixed disc, etc.) - without any end user interaction:















5	0	▼ Upgrade		
1	0	▼ 1-Old Client (Next Start)		
		  	20100520T173322Z0030	Set ini:MC_NetworkDirectory to H:\Notes_Backup
2	0	▼ 2-Old Client (Shutdown)		
		  	20100520T194217Z0034	Run Uninstall/Install Package from UNC path (after backup)
		  	20100525T093917Z0252	Backup to H:\Notes_Backup (including Eclipse Settings)
1	0	▼ 3-New Client (First Start)		
		  	20100523T110214Z0028	Roam latest backup from H:\Notes_Backup (if newer)
1	0	▼ !System		
		 	20100520T173529Z0064	Exclude ini:Entries Directory and SharedDataDirectory

Figure 9 - Upgrades with just 5 documents

The above outlined configuration includes

- Backup of the old client onto a network drive with as little as 2MB (4MB for Eclipse) - for mere upgrades, the target of the backup could also be a local fixed disc
- Invoking the upgrade (either directly or passing information on to software deployment)
- Roaming the old client configuration into the new client upon first client startup in a clean fashion

In addition to the mere upgrade job - where MarvelClient saves software deployment and helpdesk staff countless hours (if not weeks of work and headaches) and takes care of moving everything properly from one client into another, plus flanks the entire project with true transparency on who has/had what, who is already upgraded, etc. - such upgrades can be further enriched by automatically configuring a newly installed / upgraded client:

## General Client Configuration

Naturally, general client configuration is what customers ask for the most when it comes to "client management".

With MarvelClient, you can manage

- desktop icons
- workspace pages
- bookmarks
- bookmark folders
- replicas
- replicator page entries
- notes.ini settings (including the mystical Preferences= line in an easy way)
- Profile documents
- run any LotusScript or Java agent without end user interaction (and without the tracking and tracing overhead that comes with buttons in emails as to "who has opened the email, who has pressed the button" and similar)
- ECL
- location & connection documents
- toolbars

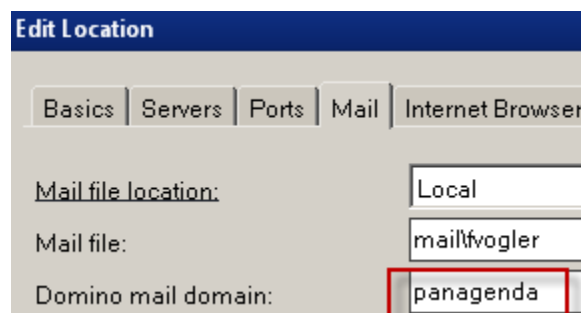
and (much!) more - with MarvelClient you can rely on having true and especially ongoing control over the many different objects and settings that Notes comes with.

In many customer environments we permanently manage as many as 100-200 objects and settings *upon each and every client startup* - plus run thousands of mass changes in large-scale migration projects (e.g. when hundreds of thousands of databases are moved from old servers to new servers over several weeks if not months).

Speaking of migration projects, this leads right into the next topic of

## Domain Changes

Sometimes, Domain changes are confused with Certifier changes. The Mail Domain is configured in each user's personal addressbook in location documents:



A user's certifier however is what comes "after her or his username in Lotus Notes" - For "florian vogler/panagenda", for example, the certifier is /panagenda.

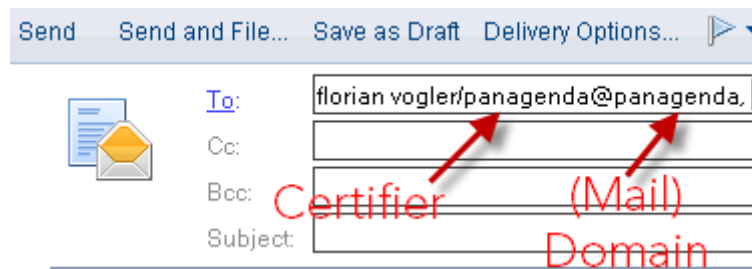


Figure 10 - Mail Domain vs. Certifier

Since in many companies the mail domain is the same as the certifier, this leads to confusion as to whether a domain change is being made or a recertification (=change of certifier). With MarvelClient both challenges are easily addressable.

As for a domain change, all it takes is a single location management action in MarvelClient to synchronize changes in the public addressbook along on clients. The following screenshot shows how to tell MarvelClient how to

- change all locations (= wildcard = \*; so that you don't have to first find out which locations people have)
- across all locations only change the mail domain where MarvelClient automatically looks up the corresponding information from the public addressbook for each and every end user
- as a sidenote, one could limit the targeted users by e.g. groups, or limit the targeted locations by formula, e.g. [SELECT Domain="OLDDOMAIN"]

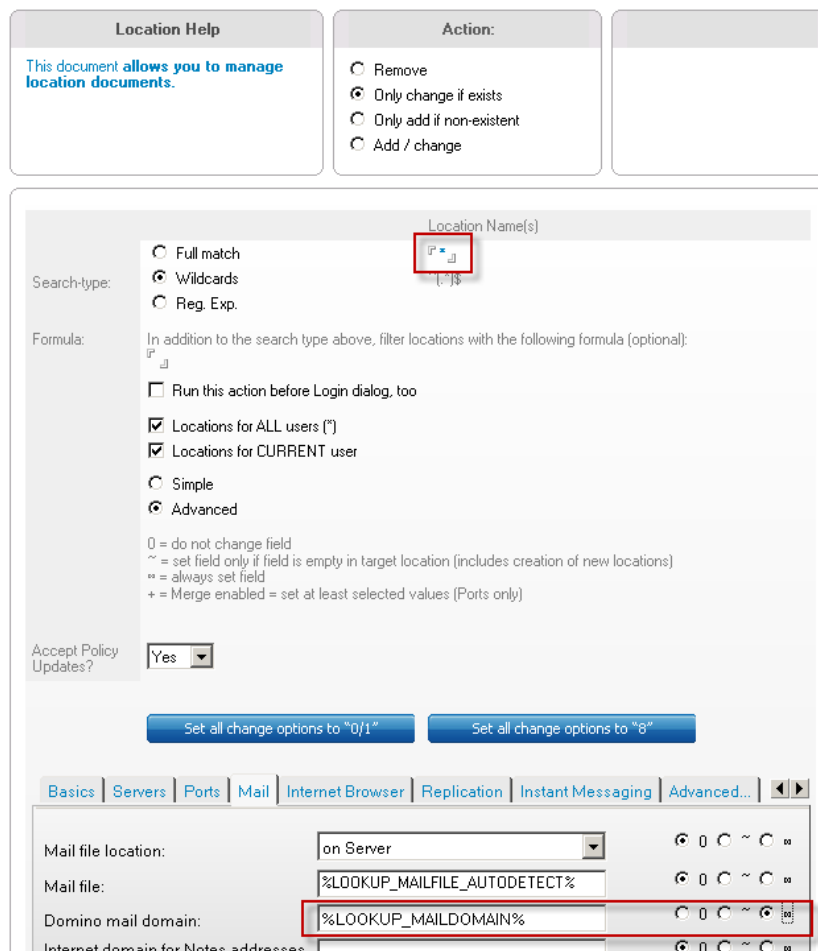


Figure 11 - "The Mail Domain change"-action

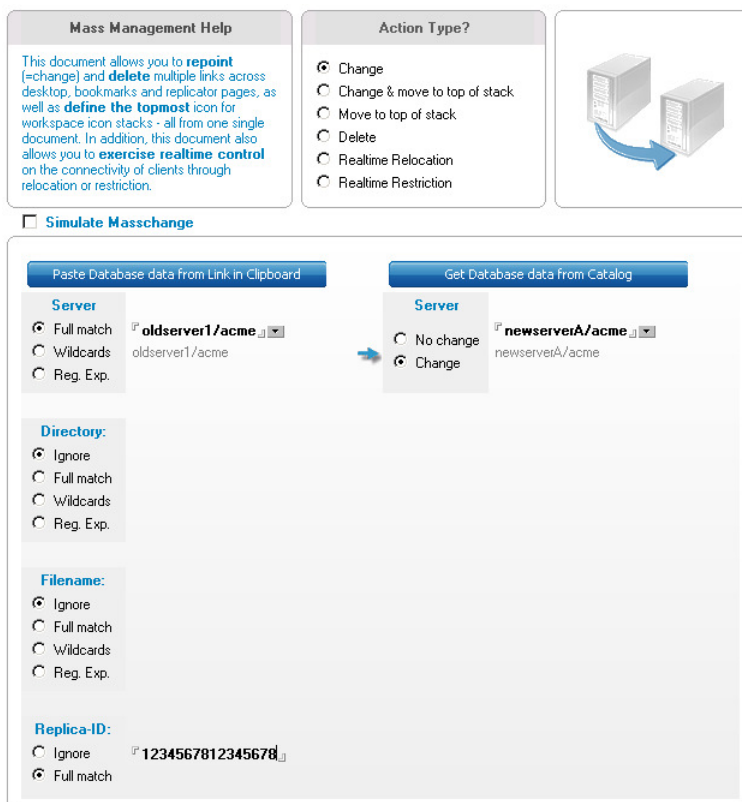
## Certifier Changes, Server / Database Moves

MarvelClient is the perfect solution to flank large scale migration / consolidation projects.

The largest migration we have flanked up until today involved moving 140,000 mail databases and 80,000 applications replicas from 1,300 old Domino servers to 90 new ones.

For large environments it would be an administrative nightmare having to find out who has (or could have) which links/databases and then only sending the relevant changes to each and every user - this would require computation of an individual package for every (affected) end user on a daily basis.

With MarvelClient, one can simply create a change for each replica to be moved from "old" to "new" server and send it to everyone - this approach includes delegates as well as every user that has a link to the respective database without having to first find out who actually does:



The screenshot shows the MarvelClient interface with the following sections:

- Mass Management Help:** A text box explaining that the document allows users to re-point (change) and delete multiple links across desktop, bookmarks, and replicator pages, as well as define the topmost icon for workspace icon stacks. It also mentions exercising realtime control on client connectivity.
- Action Type?:** A list of radio buttons for selecting an action: Change (selected), Change & move to top of stack, Move to top of stack, Delete, Realtime Relocation, and Realtime Restriction.
- Simulate Masschange:** A checkbox that is currently unchecked.
- Configuration Form:** A form with two main sections:
  - Source (Clipboard):** Labeled "Paste Database data from Link in Clipboard". It includes a "Server" dropdown set to "oldserver1/acme" and radio buttons for "Full match" (selected), "Wildcards", and "Reg. Exp.".
  - Target (Catalog):** Labeled "Get Database data from Catalog". It includes a "Server" dropdown set to "newserverA/acme" and radio buttons for "No change" and "Change" (selected).
- Directory:** Radio buttons for "Ignore" (selected), "Full match", "Wildcards", and "Reg. Exp.".
- Filename:** Radio buttons for "Ignore" (selected), "Full match", "Wildcards", and "Reg. Exp.".
- Replica-ID:** Radio buttons for "Ignore" and "Full match" (selected). The "Full match" option is associated with the value "1234567812345678".

Figure 12 - An instruction to re-point links to a specific replica

Naturally, such instructions can be automatically fed into the MarvelClient configuration database for large projects - there is no need to manually create a move instructions for each and every replica - the screenshot is just for illustration purposes of how easy it is to re-point users to a new server, directory, filename and/or replica.

An entire recertification is just as easy, where all links pointing to servernames with \*/oldcertifier can be switched to \*/acme with a single document - more specific changes are also possible (e.g. all databases in directory "mail" from \*/oldcertifier to server\_new/acme in directory "mail2", or even all databases that are not(!) in the "mail" directory on \*/oldcertifier servers to the respective directories on server\_new):

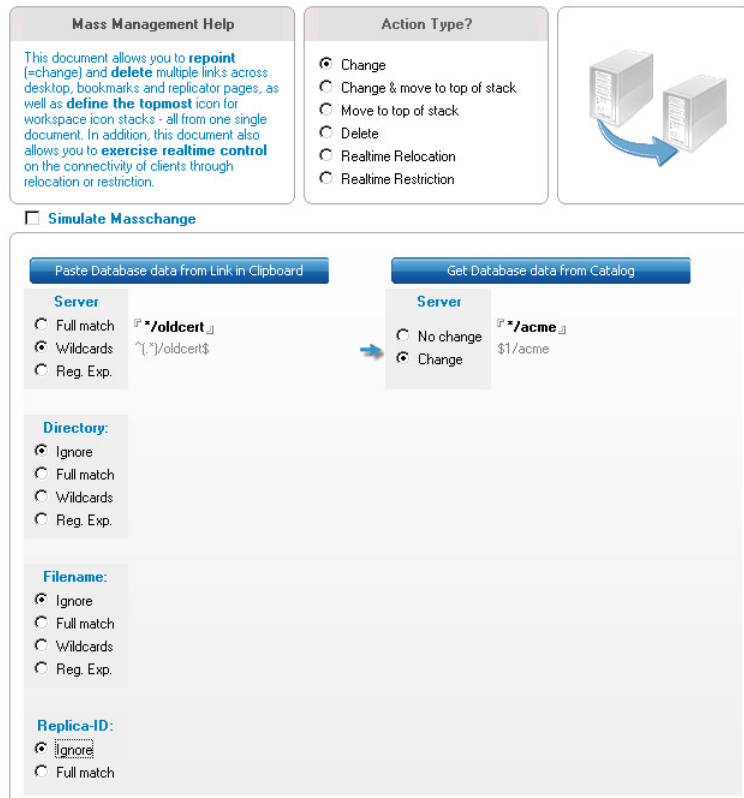


Figure 13 - Example of an action flanking server-side recertification

Technically spoken, 10,000 changes can be optimized to fit into an action-set as small as 128KB in one single document.

## Data Directory on Network Drives (not just Citrix)

In the past, many companies have implemented their own "Notes roaming" by storing the data directory on a network drive (or by copying files (many MB, even if zipped) between a network drive and a local data directory with a self-developed solution that kicks in "before" client startup and "after" client shutdown).

Having the data directory on (or Notes client files synchronized with) a network drive usually comes with quite a many problems, where notes.ini, bookmarks, desktop files become corrupted from time to time. This is because the Notes client architecture relies on pretty much immediate responsiveness of the underlying file system, which is a problem when the network connection towards the network drive is lost/disrupted for even just a very few seconds.

The "solution" for many companies is frequent restores of desktop, bookmarks, notes.ini, cache.ndk, respectively deleting the files and thereby implicitly destroying an end users configuration and forcing her/him to re-link with all the needed databases from scratch.

With MarvelClient only 2MB (4MB for when including Eclipse settings, too) of network drive storage are required to backup and roam an entire client configuration from one computer to another. This leads to significant storage cost savings compared to typically 30-100 MB of data directory storage on network drives *per user* without MarvelClient.

MarvelClient's roaming implementation fixes all of the corruption problems companies otherwise have with operating a Notes client directly from a network drive. Also, with MarvelClient roaming, clients start faster (as only 2-4 MB are pulled from the network drive as opposed to working on 30+ MB of raw data directly) and clients are network drive independent for the entire remaining Notes session. This also leads to 95%(!) less network traffic compared to operating a Notes data directory on a network drive.

## Roaming

Backup/"Roaming" as explained in the previous chapter "Data Directory on Network Drives" can be used for more than just "classic roaming from one computer to another":

- Have the same configuration on a new laptop/computer, even if this is "just once a year" - without involving helpdesk staff
- Having the same configuration across Citrix, Laptops, Desktops and even multiple Notes releases - where MarvelClient is naturally smart enough to ensure e.g. just one location when roaming onto Citrix and two location documents when roaming back to a Laptop, as well as only create missing replicas on a Laptop, and much more

Last but not least, MarvelClient roaming is also a perfect solution for Citrix customers:

## Citrix

Without MarvelClient, installing Notes clients on Citrix requires the data directory to reside on a network drive in order to "roam" between (rather: have the same configuration across) different Citrix servers - this introduces all of the problems outlined in the chapter "Data Directory on Network drives".

With MarvelClient, the Notes client install on Citrix can be turned into a local(!) client install, into which MarvelClient roams before mentioned 2-4MB upon client start and automatically backs up the configuration upon client shutdown.

The result here, too, is faster client startup times, 95% less network load between the Citrix server and the filer (network drive) infrastructure, plus you get back into IBM support, as operating the data directory from a network drive is not supported by IBM - with MarvelClient you are then running a local Notes client, which is perfectly supported by IBM.

In addition to the significant benefits that come with MarvelClients roaming module, MarvelClient also offers a so called realtime module.

The realtime module allows to restrict selected database operations, such as preventing users from creating or deleting local databases, which is a huge support- and cost-saver on Citrix.

The following screenshot shows the configuration to disallow the creation or deletion of any local database, except for \*.ncf (=Clipboard) files:

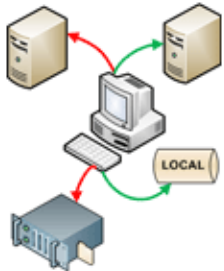
<p><b>Mass Management Help</b></p> <p>This document allows you to <b>repoint</b> (=change) and <b>delete</b> multiple links across desktop, bookmarks and replicator pages, as well as <b>define the topmost</b> icon for workspace icon stacks - all from one single document. In addition, this document also allows you to <b>exercise realtime control</b> on the connectivity of clients through relocation or restriction.</p>	<p><b>Action Type?</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Change</li> <li><input type="radio"/> Change &amp; move to top of stack</li> <li><input type="radio"/> Move to top of stack</li> <li><input type="radio"/> Delete</li> <li><input type="radio"/> Realtime Relocation</li> <li><input checked="" type="radio"/> Realtime Restriction</li> </ul>	
<p><b>Applies to ...</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Database Access</li> <li><input checked="" type="checkbox"/> Database Creation</li> <li><input checked="" type="checkbox"/> Database Deletion</li> </ul>	<p><b>White-/Blacklist?</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Disallow (=Blacklist)</li> <li><input type="radio"/> Allow (=Whitelist)</li> </ul>	
<p><b>Server</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Full match</li> <li><input type="radio"/> Wildcards = [Local] (only)</li> <li><input type="radio"/> Reg. Exp.</li> </ul> <p><b>Directory:</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Ignore</li> <li><input type="radio"/> Full match</li> <li><input type="radio"/> Wildcards</li> <li><input type="radio"/> Reg. Exp.</li> </ul> <p><b>Filename:</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Ignore ^.*[?!&lt;incf]\$</li> <li><input type="radio"/> Full match ^.*[?!&amp;lt;incf]\$</li> <li><input type="radio"/> Wildcards</li> <li><input checked="" type="radio"/> Reg. Exp.</li> </ul>		

Figure 14 - Disallow creation/deletion of local databases

As opposed to most actions running upon client startup, real-time actions in MarvelClient are enforced during the entire Notes session (=whilst the client is up and running). So instead of fixing / enforcing particular configurations permanently, MarvelClients realtime module allows to prevent certain problems.

## Travelling users

Similar to the realtime restriction module, MarvelClient also allows for realtime redirection of database accesses.

Since it is difficult to explain to end users (especially managers) that they have to switch location when leaving the office or travelling to another office/country, with MarvelClient you can automatically and dynamically redirect database access to nearest servers and/or local replicas by IP-Segments - all without having to switch locations.

Once a client has downloaded a set of dynamic redirection rules, realtime relocation supports hibernation. A manager can simply close her/his laptop, travel to another office and will be immediately connected to nearer servers or local replicas as has been defined for particular network segments (respectively IP addresses not within specific segments).

Not to forget that MarvelClient also enforces your configuration for offline/travelling users, too - so that a Manager or sales agent on the road always has a self-healing client, respectively her/his own virtual helpdesk - being MarvelClient.

## **Upper Management**

As one of the final chapters in this document, it is of importance to understand the value of MarvelClient especially for upper management:

Chapter "Client Management „90% is enough“" already explained why in virtually all larger companies, especially managers are frustrated with IBM Lotus Notes.

Looking at the Notes 8 preferences dialog, it is far from surprising that not only managers, but any end user has difficulties to understand the wealth of options that are the basis of IBM Lotus Notes clearly excelling Microsoft Outlook.

Quite naturally, a "mail only software" does not come with as many options as IBM Lotus Notes being a true Groupware/Collaboration platform way beyond just email.

The strenghts of IBM Lotus Notes are implicitly also its Achilles' heel: the more options IT and/or end users have, the more can go wrong, and the more control is needed to keep efforts and costs down.

With panagenda MarvelClient, all end user can focus on their daily work, rather than continuously struggling with the myriad of options and the limited functionality IBM provides to control them all.

Managers no longer have to think in locations, offices, connected state, let alone any of the preferences Notes allows to customize, but can be provided with an IBM Lotus Notes client that is truly smooth and frictionless to work with (as opposed to having to operate a piece of software as an end user).

Helpdesk staff can be significantly relieved from workload associated with operating / supporting a Lotus Notes client environment.

Finally, all end users are more productive as MarvelClient makes sure that Lotus Notes "just works".

## "One" last word

MarvelClient can help with **much** more than is addressed in this document.

Ideally whenever it comes to virtually anything related to IBM Lotus Notes clients and you'd wonder whether MarvelClient could help - please contact us.

If you wouldn't even wonder whether MarvelClient could help but think "it wasn't part of the document I read" then we've failed to make the point that client management - or rather client operations - is what we are experts in and MarvelClient has proven its value for years around the globe.

Hence, we have seen and solved a myriad of challenges across our customer base given over 2,500,000 licenses in production in over 70 countries across virtually all possible flavors of Lotus Notes client installs and operating systems.

Almost every customer is different - if you help us understand your needs, you'll know within a snap how we - or rather MarvelClient - can help you save nerves, time and money.

We look forward to hear from you!

## About GROUP Business Software

GROUP Business Software is the leading provider of IBM Lotus based solutions and services in the fields of Email Management and Archiving, Cloud Computing, CRM, Corporate Compliance and Administration. The GROUP business units offer "Collaborative Business Solutions" to support companies and end users in their daily work and to simplify business processes.

While competitors only offer partial solutions for collaborative systems, GROUP provides a comprehensive and harmonized solution portfolio which includes all areas of collaboration. By integrating GROUP solutions in business processes, companies and organizations achieve their goals easier, faster and more efficiently.

### Competencies

**Central:** GROUP solutions make it possible to manage and control business-critical process from a central location, thus relieving both administrative staff and end users in their daily work. With all users included on a company-wide basis using a server-based system, all of their operations can be controlled and managed from a central interface.

**Uncomplicated:** GROUP solutions feature outstanding usability and unmatched efficiency. While reducing the necessary user interaction to a bare minimum, the server-based solutions provide intelligent automatisms that contribute to increasing productivity and cost-effectiveness.

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### Customers

GROUP is based in Europe and the USA. Companies worldwide rely on GROUP solutions for the security, organization and efficiency of their systems. GROUP customers include well-known companies from all over the world, such as Deutsche Bank, Ernst & Young, Honda, Heineken, Allianz and Miele.

For further information please visit [www.gbs.com](http://www.gbs.com)

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