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SHOW 103 - Roaming in Domino 8.5: Configure the best choice for you

Andy Pedisich | President, Technotics, Inc.

Rob Axelrod | Vice President, Technotics, Inc.



lotusknows.com



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Who the heck are these guys presenting the Show and Tell?

- They are two IBM® Lotus® Notes® Administrators/Developers who have been around the block with Notes for a very long time
- From Technotics, Inc. in Philadelphia, Pennsylvania - USA
 - Andy Pedisich – 25 years in computers, 15 years with IBM Lotus Notes
 - Rob Axelrod – 20 years in computers, 17 years with IBM Lotus Notes
 - And they have the scars to prove it!
- Comon, guys, show them the scars!

This session's test environment

- Our host laptop is a Dell Studio™ 1555
 - The operating system is Microsoft Windows 7 Ultimate – 64 bit
 - Copyright © 2009 Microsoft Corporation. All rights reserved
 - Microsoft and Windows are trademarks of Microsoft Corporation in the United States, other countries, or both.
 - Intel(R) Core(TM) 2Duo CPU T9600 2.80 GHz
 - 8 GB memory
- IBM® Lotus® Domino® Server Release 8.5.1 64 bit
 - Running on host system, Using IP address of the laptop's network interface card
- Running 2 VMware® Workstation R7 virtual machines with
 - Microsoft Windows XP Professional x64 Edition version 2003 service Pack 1
- IBM® Lotus® Notes® multi-user client installed on each VM
 - We'll be installing a Google ©2009 Gadget during this session
 - We'll also be referring to IBM® Lotus® Sametime® when we configure clients

How we'll use the virtual machines

- Both virtual machines will be running throughout the presentation
 - They represent two workstations that can be used by each roaming user client we create or each normal user we upgrade
- You'll be able to see how each user can change the desktop and how those changes roam to another desktop

Virtual Machine Settings

- All workstation Vms are set as seen on this slide
 - Most important, they are using NAT protocol so that they can work with the Domino server Admin/servers/domlab which is installed on the network card on this laptop

Devices	Options
Memory	1024 MB
Processors	1
Hard Disk (SCSI)	60 GB
CD/DVD (IDE)	Auto detect
Floppy	Auto detect
Network Adapter	NAT
USB Controller	Present
Sound Card	Auto detect
Display	Auto detect

Devices	Options
General	XP Pro x64 Roaming 1
Power	
Shared Folders	Disabled
Snapshots	
AutoProtect	Disabled
Replay	Debugging enabled
Guest Isolation	Enabled, Enabled
Encryption	Not encrypted
Tools	Default
Remote Display	Disabled
Unity	
Appliance View	Disabled
ACE	Disabled
Advanced	Default/Default

Agenda

- Frequently asked questions about roaming users
- The multi-user client systems
 - Why the multi-user client is needed
 - Installing the multi-user client
 - Examining how multi-user changes a workstation
- Creating a user who roams on a Domino server
 - Beginning the creation of the user
 - Determining the location of the roaming user files
 - Creating roaming files in foreground or background
 - Taking advantage of Domino clusters
 - Understanding the options to cleanup workstations
 - Looking at the changes on Domino when a roaming user is created

Agenda (cont'd)

- What's it like to be a roaming user on Domino?
 - What happens when a roaming user starts the first Notes client on workstation #1
 - What does the roaming user end up with?
 - Understanding what happens to Notes client replication
 - Following the roaming user as desktops and bookmarks are changed
 - What happens when the roaming user moves to workstation #2
- Making more changes to the roaming user interface
 - Changing the roaming user's sidebar
 - Adding the Lotus Learning plug-in
 - Installing a Google Gadget currency converter
 - Logging into Sametime
 - Adding a feed to the feedreader
 - Logging off as a roaming user
 - Examining what roamed from workstation #2

Agenda (cont'd)

- Upgrading a normal user to a roaming user
 - Creating the normal user
 - Normal user sets up a Notes client on workstation #1
 - Creating a NOTEBOOK.NSF for the normal user
 - Upgrading the normal user to roaming
 - Looking at what happens during the upgrade
 - Roaming user logs back onto workstation #1
 - User is upgraded to roaming user
 - Notes client is restarted
 - Upgraded user logs onto workstation #2
 - Downgrading a roaming user

Agenda (cont'd)

- Roaming on a file share
 - Creating the normal user who will roam
 - Normal user sets up on workstation #1
 - Adding a share for the roaming user's files
 - Creating a policy settings document for the file share roamer
 - Creating a policy document for the files share roamer
 - Assigning the policy for the file share roamers
 - Roaming user re-connects to workstation #1
 - Roaming user connects to workstation #2 for the first time
- Some additional facts about roaming users
- Q & A

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What is a roaming user?

- Roaming users are users who access Notes from more than one Notes client
- Roaming users access their customized settings and personal information automatically from any Notes workstation in your domain
 - This gives the roaming user a consistent experience from any Notes client
 - Roaming users can have their own personal directory on multi-user workstations
 - Plus, they can even have a “main” workstations that are single user client installs



What roamed in the earlier releases?

- In R6.x, 7.x, 8.0.x basic client:
 - Personal Address Book – NAMES.NSF
 - Bookmarks – BOOKMARK.NSF
 - Journal – JOURNAL.NSF
- Is there anything that would be considered generally important missing from this list?
 - Yes!
 - DESKTOP6.NDK which provides the graphic user interface or as we like to call it: **The workspace**
- The standard client did not roam in any release previous to R 8.5.1

What roams in Release 8.5?

- Starting with R8.5 the standard client roams
- And some files have been added that roam
 - Offline Feed Content - **LOCALFEEDCONTENT.NSF**
 - The user's configuration of the feed reader in the sidebar
 - Roaming Users Data - **ROAMINGDATA.NSF**
 - The user's plug-in configuration
- There has been a change to the Journal/Notebook
 - Journal will roam as either **JOURNAL.NSF** or **NOTEBOOK.NSF**



More about the journal/notebook

- Personal notebook or journal application must reside in the top level of the Notes data directory to be included with files that roam
 - Default journal names of **NOTEBOOK.NSF** or **JOURNAL.NSF** are supported as well as non-default journal names
 - As long as they are set on the user's homepage using Options - Set Notebook
 - You'll see more about this during the session
- Note that all of the files that roam are Notes application files (NSFs)

Doesn't the desktop roam?

- Technically, **DESKTOP8.NDK** does not roam
 - It has a proprietary structure that isn't built to replicate
- However in Release 8.5.1 and forward, the user interface is stored in the user's **BOOKMARK.NSF**
 - That file along with the desktop UI is replicated from workstation, to server, and back to workstation



Where are all these files stored?

- In R6.x, 7.x, 8.0.x, and 8.5.x basic client files that belong to a roaming user are stored on
 - The user's home Domino server
 - Or special "roaming" Domino servers
- In Release 8.5.x, Notes standard clients can roam using Domino servers too

More About the Roaming Domino Server

- Both the Notes standard and Notes basic client can roam on a Domino server
 - And all roaming databases are protected with Domino security
 - A great part about using Domino is that failover is supported with Domino clustering
- Note:
IBM/Lotus does not recommend roaming settings between the Notes client basic configuration and Notes client standard configuration

Isn't there a file server option someplace?

- Release 8.5.1 adds a file server option
 - Notes standard clients can use a Windows based file server for roaming
- In all cases personal data flows between
 - A Domino roaming/mail server or a file server
 - A user's Notes client system
 - A Domino roaming/mail server or a file server
 - And back to the user's Notes client system
 - Client operating system must be Microsoft Windows
 - **Unlike Domino server roaming where the client operating system can be Windows or Linux or Macintosh, file server roaming is restricted to Windows only**

Note

Can everyone be a roaming user?

- Almost anyone can be a roaming user
 - There are some notable exceptions
- Roaming user is not supported with an all-client install that includes:
 - IBM Lotus Domino Designer
 - IBM Domino Administrator
- Switching user IDs is not supported
 - It can cause unintentional user downgrade from roaming back to being a normal user
 - **If you use multiple IDs on the same computer, roaming is not supported**
- Roaming user IDs are not supported with Notes Single Logon

Do roaming users need some kind of special Notes client?

- Most implementations provide workstations that were installed with the multi-user client
 - This accommodates the roaming user who really roams from workstation to workstation
- We'll cover this multi-user workstation next in this presentation
 - It's an important puzzle piece in the roaming user configuration



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Multi-user Notes client is core to roaming

- A roaming user can use a client installed for a single user
 - However roaming users are usually deployed on multi-user Notes client
- If all workstations were installed with the multi-user Notes client
 - A roaming user could conceptually sit down at any workstation in the enterprise
 - And have just about the same environment at each one
 - There are some serious considerations about the above statement that we will go into during this presentation

The multi-user Notes installation

- Lots of enterprises use this great feature when multiple users share a same workstation
 - Perfect where multiple shifts use same PC every day
 - 24x7 factory floors
 - Help desks
 - Telemarketers
- Each user has his or her own secure place to keep Notes data with no conflicts
 - Each user has a their own data directory automatically
 - No location documents are needed to manage the various users on the workstation

Requirements for multi-user Notes client

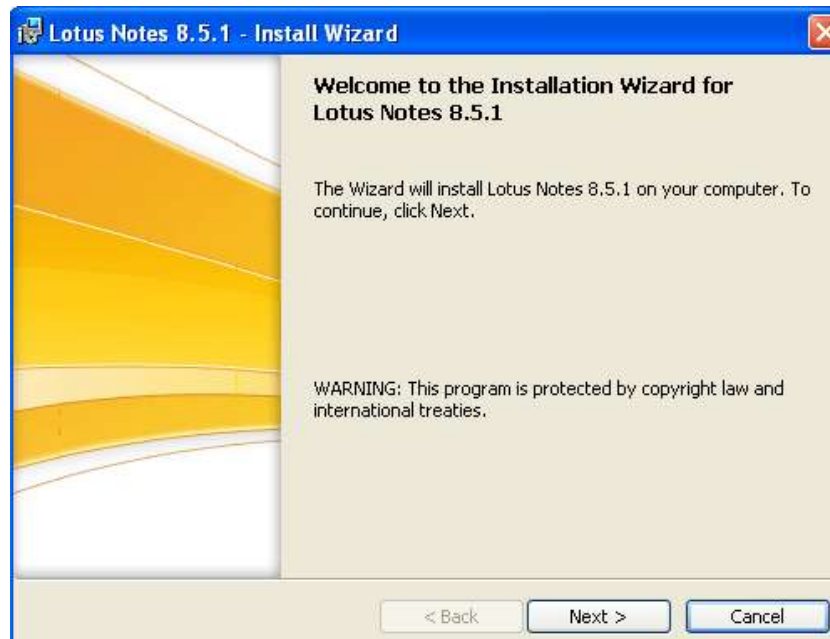
- Multi-user installation applies only to Microsoft Windows clients
 - No Macs
- The multi-user installation is supported only for the Notes client
 - Not supported for installing the IBM Domino Administrator client or IBM Lotus Domino Designer
 - The multi-user install option is available only in the IBM Notes Client installation kit

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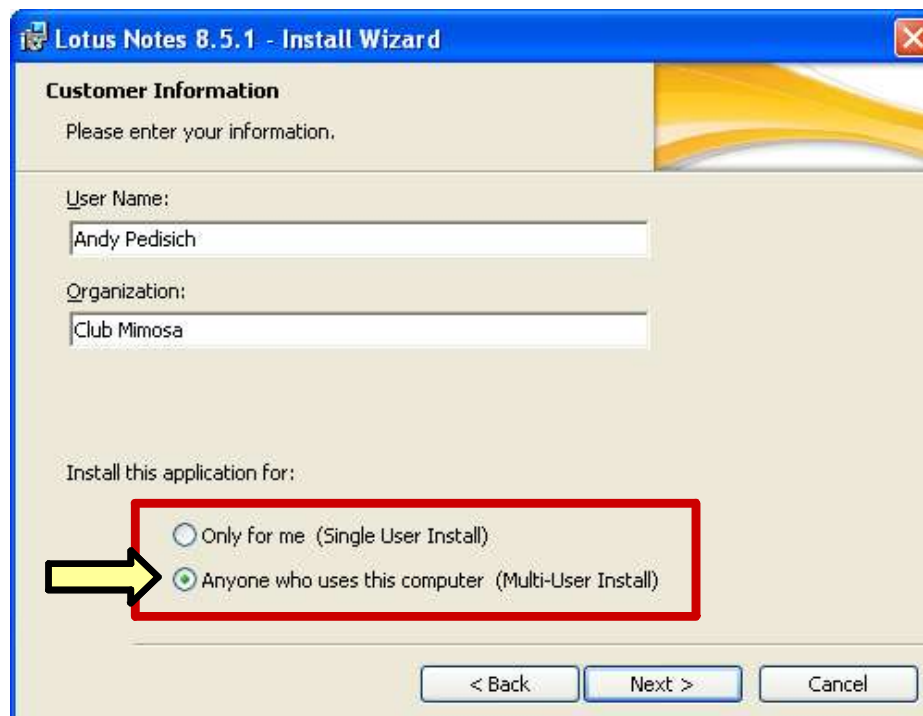
Installing the multi-user Notes client

- Process looks totally normal
 - Running SETUP.EXE gets you started as usual



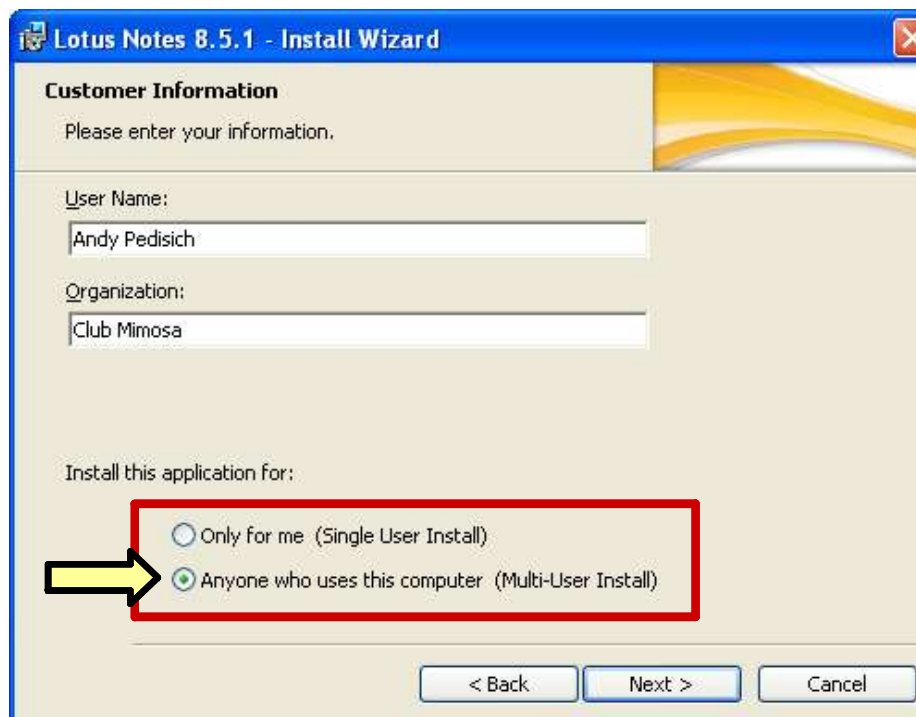
Things get different right away

- You are prompted to install “Only for me” which is the default or...
 - “Anyone who uses this computer” which changes how it installs to a multi user install



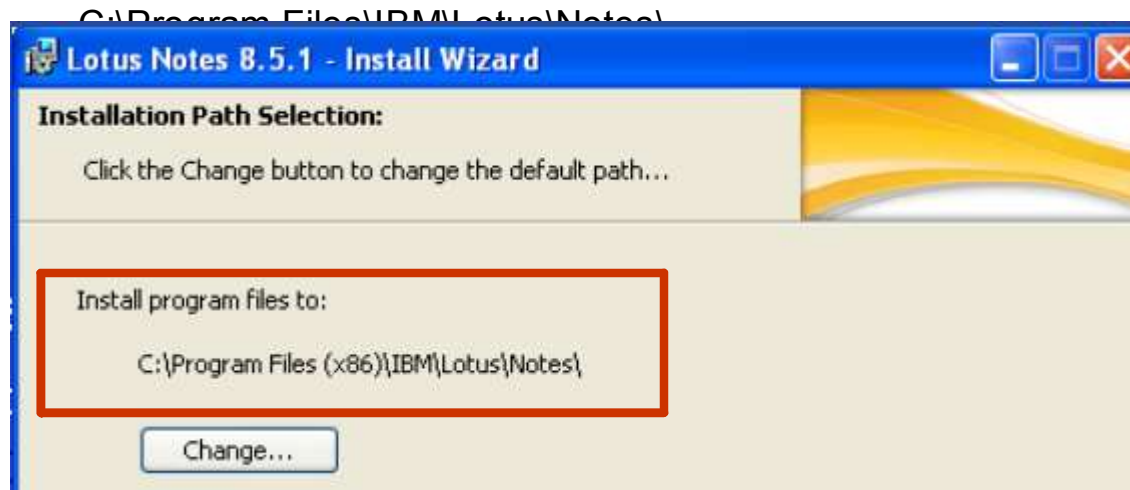
Ordinary users never see this option

- You must be an administrator or have specific elevated installation rights to see this option and be able to complete the installation



Confirm location of executables folder

- The installation process offers a default folder
 - But you won't be asked for a location for the data
 - We'll find out why in a few moments
- This snapshot in this example was taken on a 64 bit XP system
 - The default program folder on a 32 bit system will be:

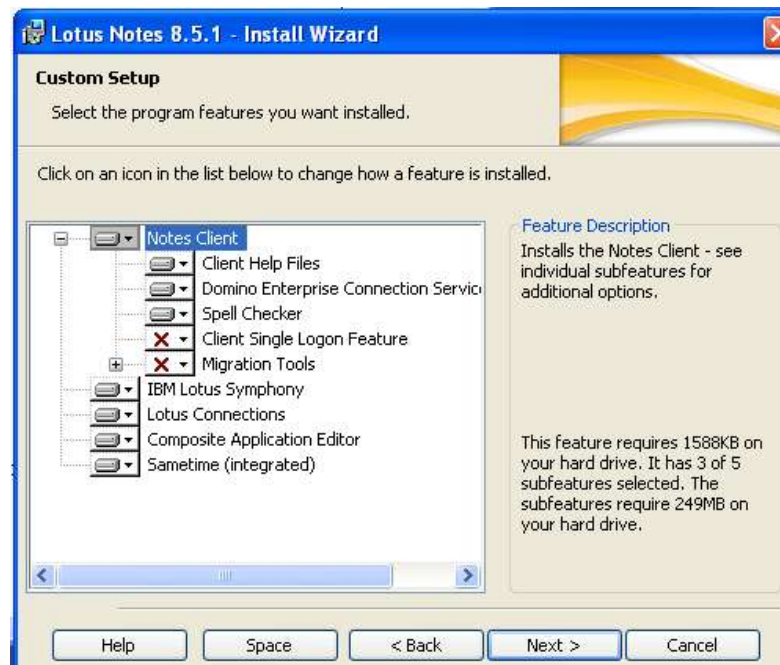


Upgrading multi-user clients

- If upgrading an existing multi-user installation, the default folder will be the current location of the executables
 - This behaves the same way as the normal Notes client installation

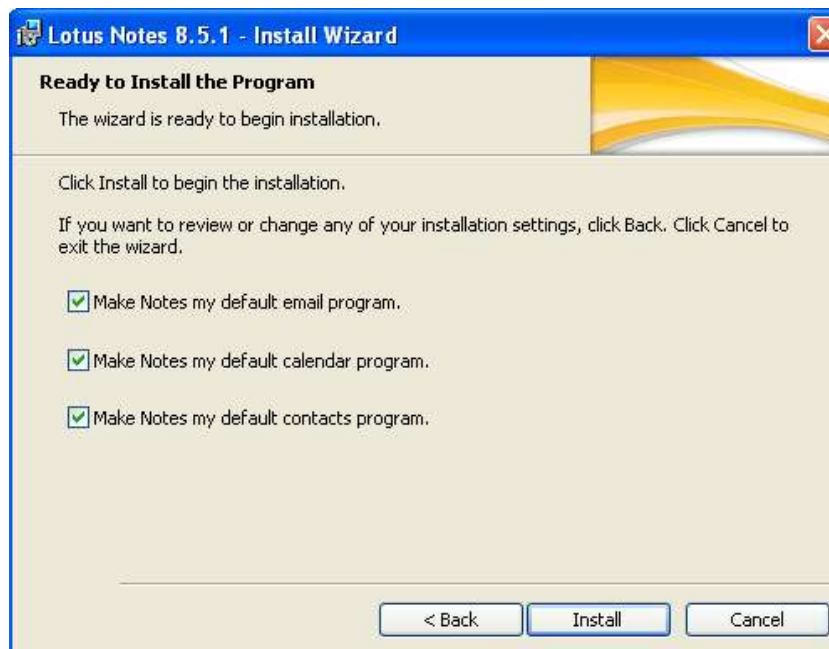
Select options based on requirements

- Each enterprise has different needs regarding these options
 - However, keep in mind that Client Single Login Feature is not supported by roaming user



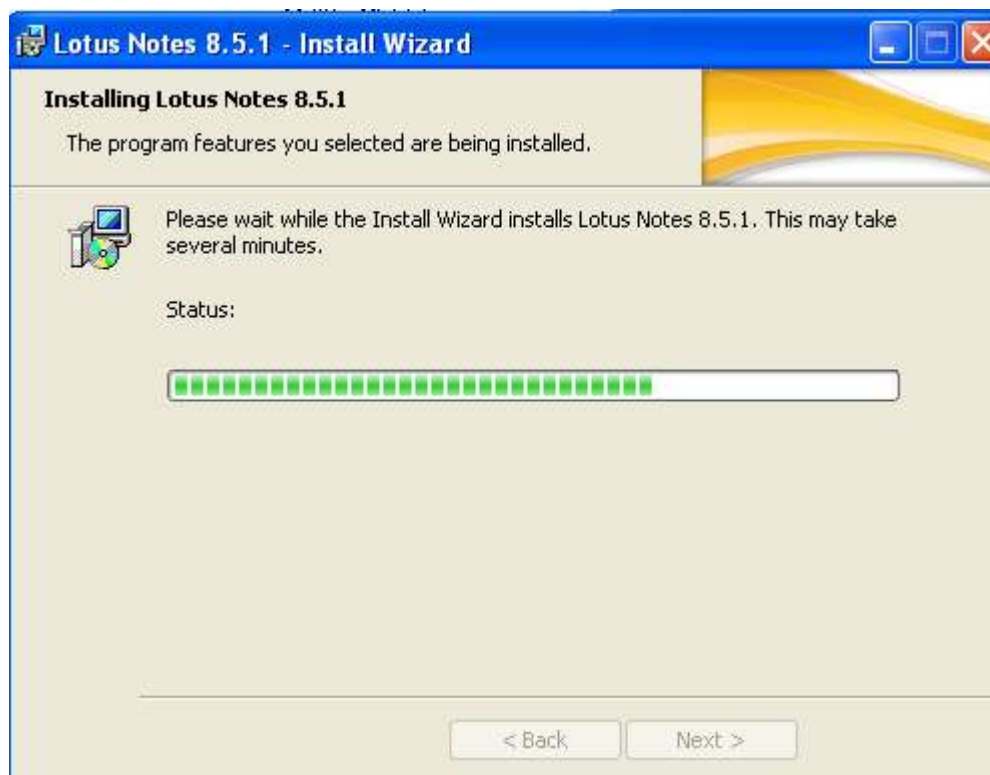
Use Notes for defaults

- Yes, go ahead, make Notes the default for mail, calendar and contacts
 - Why else would you be at Lotusphere?



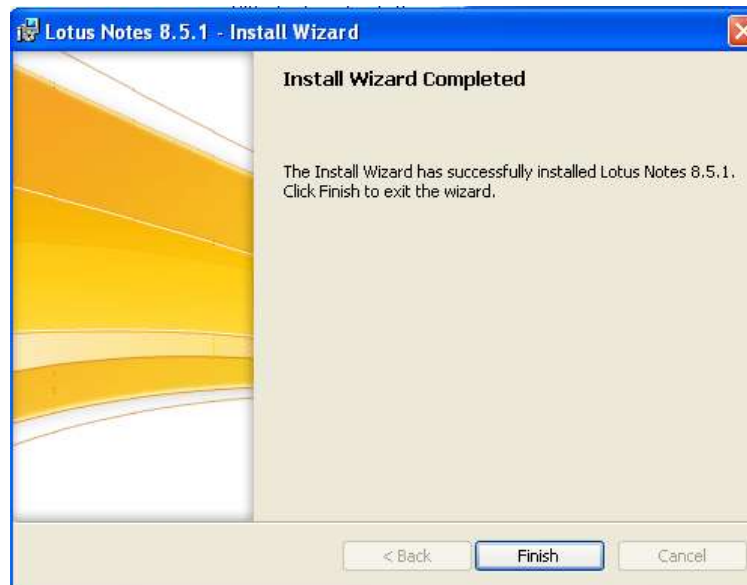
You're on your way to multi-user

- Time to completion completely depends on the speed of the workstation



Mission accomplished

- That's all, folks. You're finished
- You've installed program files but no user data
 - The user data folder will initialize during user set-up
 - However, there have been a more than a few files added to the workstation

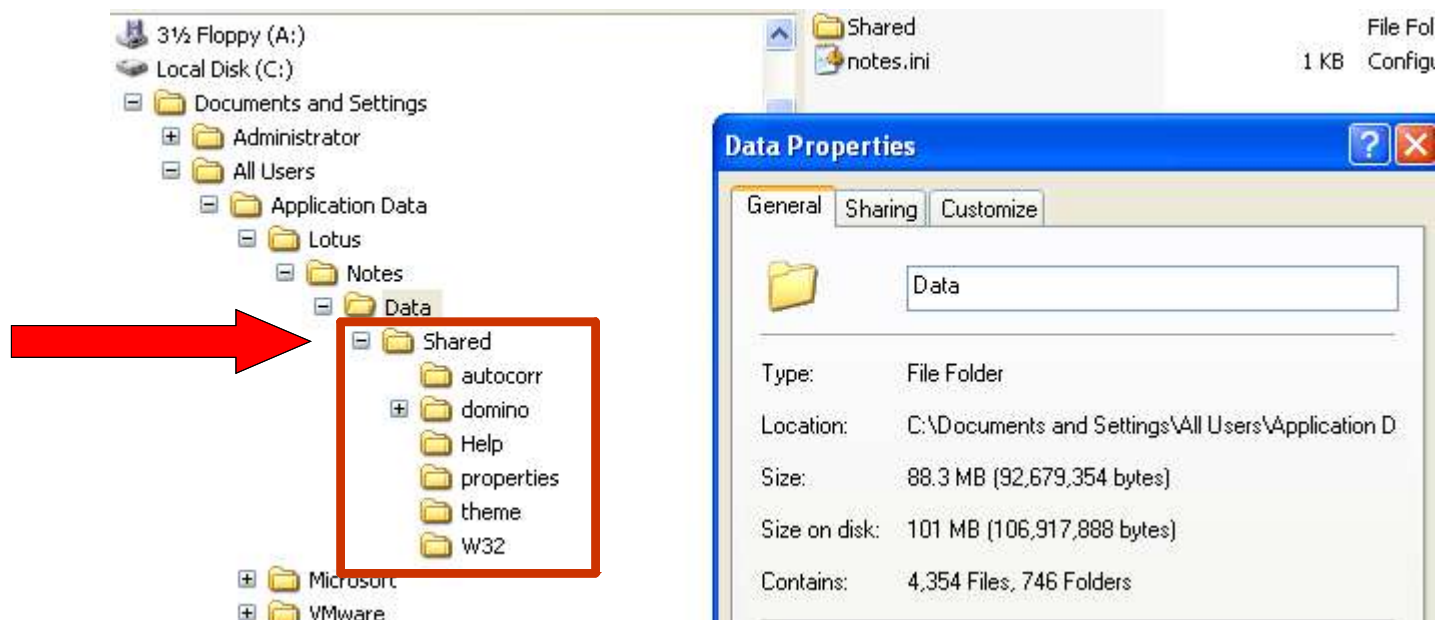


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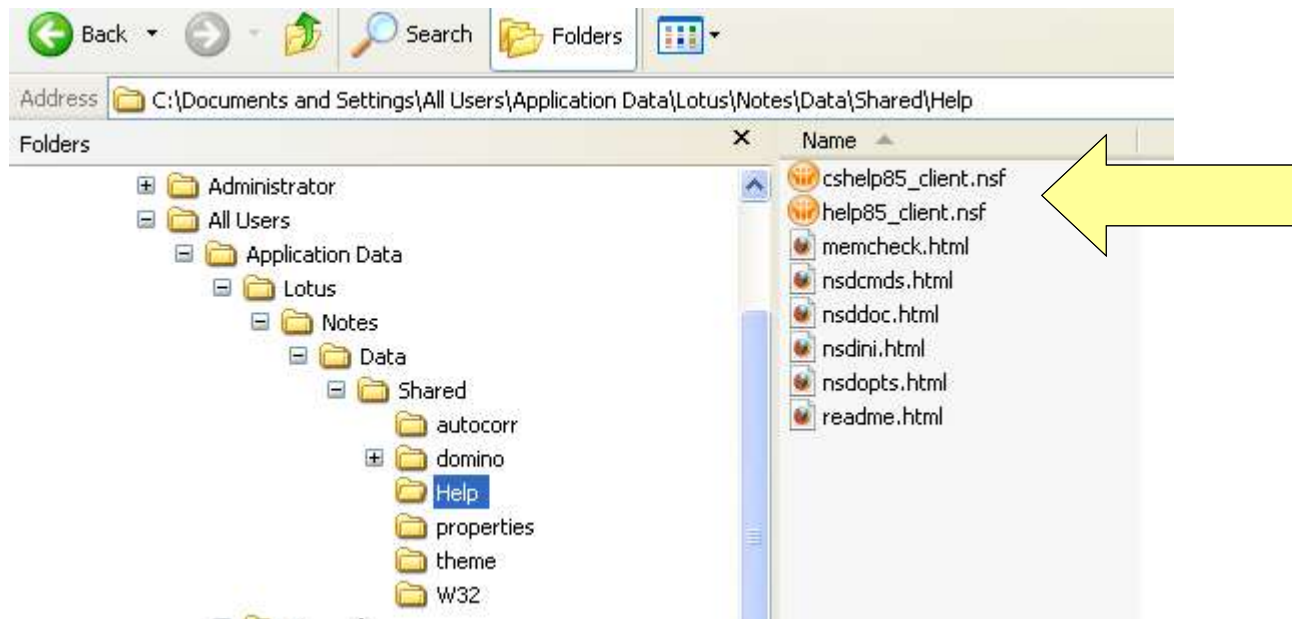
You've added files that will be shared

- The multi-user installation has installed over 100 MB of shared files like templates and .JAR files
 - They're in Documents and Settings\All Users\Application Data\Lotus\Notes\Data\Shared



Shared help files are installed

- The multi-user installation saves disk resources
 - A single set of help files have been installed that will be used by everyone on workstation



All the templates needed by clients

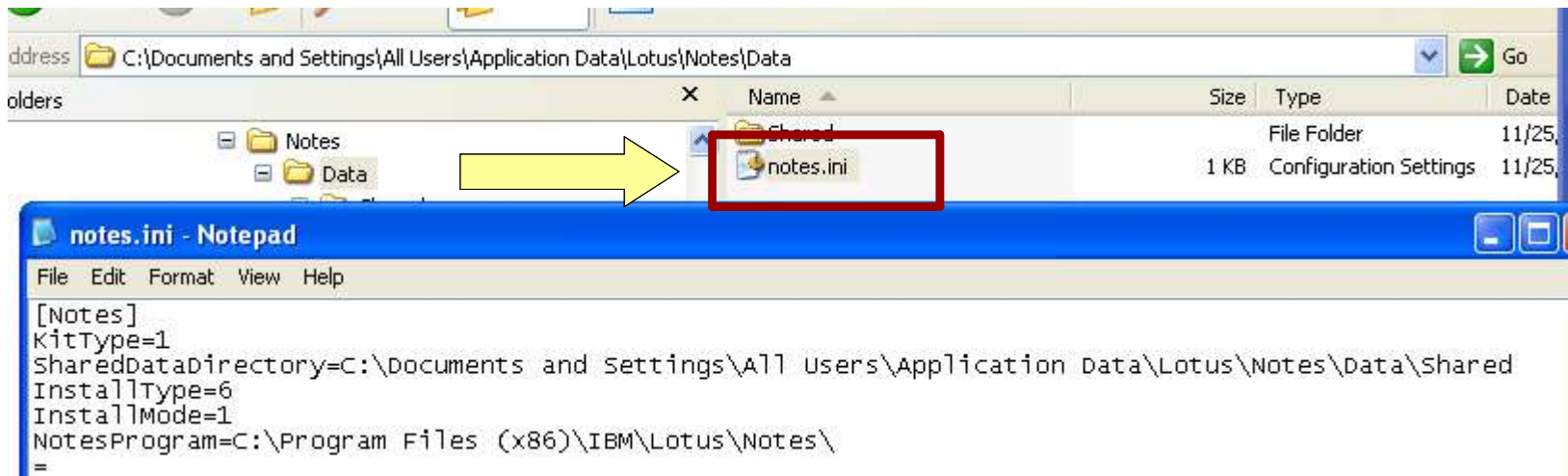
otes\Data\Shared

Name	Size	Type
error.gif	1 KB	GIF Image
image.gif	1 KB	GIF Image
sound.gif	1 KB	GIF Image
folder.gif	1 KB	GIF Image
movie.gif	1 KB	GIF Image
link.gif	1 KB	GIF Image
unknown.gif	1 KB	GIF Image
text.gif	1 KB	GIF Image
binary.gif	1 KB	GIF Image
graphic.gif	1 KB	GIF Image
KeyView.ini	12 KB	Configuration Settings
browser	13 KB	SpeedDial
busytime.ntf	142 KB	IBM Lotus Notes te...
us.med	219 KB	MED File
cache.ntf	256 KB	IBM Lotus Notes te...
alog4.ntf	320 KB	IBM Lotus Notes te...
autosave.ntf	320 KB	IBM Lotus Notes te...
dblib4.ntf	320 KB	IBM Lotus Notes te...
headline.ntf	320 KB	IBM Lotus Notes te...
nntpc6.ntf	320 KB	IBM Lotus Notes te...
imapc5.ntf	357 KB	IBM Lotus Notes te...
roamingdata.ntf	384 KB	IBM Lotus Notes te...
archlg50.ntf	402 KB	IBM Lotus Notes te...
feedcontent.ntf	448 KB	IBM Lotus Notes te...
doclbs7.ntf	729 KB	IBM Lotus Notes te...
doclbm7.ntf	819 KB	IBM Lotus Notes te...
doclbw7.ntf	972 KB	IBM Lotus Notes te...
notebook8.ntf	1,080 KB	IBM Lotus Notes te...
perweb50.ntf	1,116 KB	IBM Lotus Notes te...
canadien.dic	1,179 KB	DIC File
us.dic	1,558 KB	DIC File
uk.dic	1,575 KB	DIC File
log.ntf	1,580 KB	IBM Lotus Notes te...
phonebook7.ntf	1,787 KB	IBM Lotus Notes te...
mailbox.ntf	2,816 KB	IBM Lotus Notes te...
updatesite.ntf	2,816 KB	IBM Lotus Notes te...
discussion8.ntf	3,840 KB	IBM Lotus Notes te...
pernames.ntf	4,608 KB	IBM Lotus Notes te...
bookmark.ntf	5,376 KB	IBM Lotus Notes te...
mail85.ntf	24,064 KB	IBM Lotus Notes te...

- There are plenty of templates for the multi-user installation
- This includes
 - MAIL85.NTF
 - Dictionary files
 - And other supporting files

An important stub

- Also in that shared area... a stub of a NOTES.INI file that will be used by the clients
 - It points the way to the shared data directory

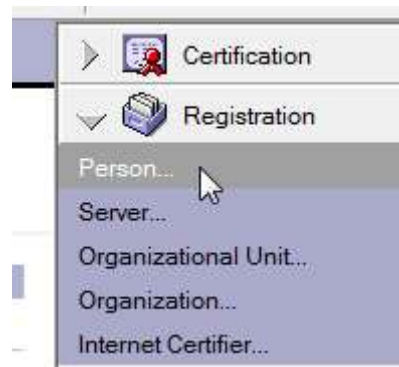


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- **Creating a user who roams on Domino server**
 - **Beginning the creation of the user**
 - Determining the location of the roaming user files
 - Creating roaming files in foreground or background
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 - Understanding the options to cleanup workstations
 - Looking at the changes on Domino when a roaming user is created

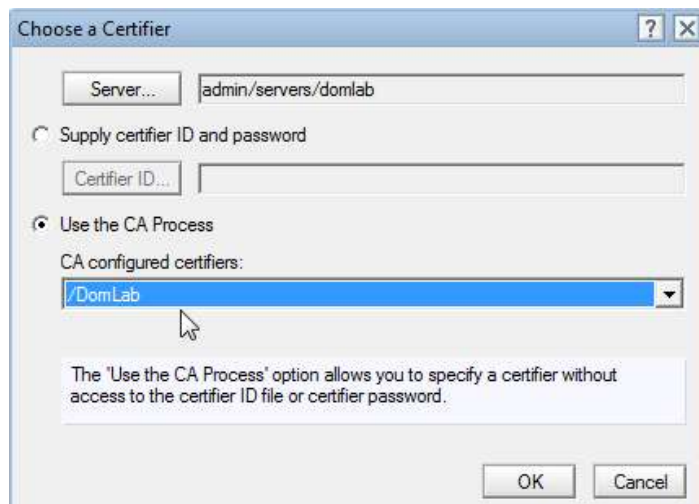
Creating a user that roams on Domino

- Users who will use a Domino server to hold their roaming files must be created using the Lotus Domino Administrator client
 - Upgrading normal users to roam on a Domino servers is also controlled by the Lotus Domino Administrator client
- Start the registration process by selecting Person from the Registration navigator



Choose your certifier method

- As with any user creation, you have two choices when selecting a certifier to create the user
 - You must supply a certifier ID file and enter the password for the file or...
 - You can use a certifier that has been migrated to the Certificate Authority (CA) process



We prefer the certificate authority

- We generally like to use the Certificate Authority, referred to as the CA, because:
 - We're very lazy and we don't have to remember where the stupid certifier ID is
 - Andy is getting older and cannot remember the certifier ID password
 - Or his own phone number
- But mostly because there is physical contact with the certifier ID file required
 - **That adds up to tighter security**
- However, this session isn't about the certificate authority
 - For great details, check out Administrator's Help or contact us for more information

Click the checkboxes

- Be sure to check the Advanced checkbox so the options for Roaming User display
 - Is there anyone on earth that does not check the Advanced checkbox when creating a new user

Register Person -- New Entry

Provide name, password and other basic information for the new person. To view/edit additional registration settings, check the 'Advanced' checkbox below.

Registration Server... admin/servers/domlab

First name: Middle name: Last name: Short name:

Password: Mail system: Lotus Notes Explicit policy: (No explicit policy assigned)

Password Options... Organization policy: */DomLab

☒ Enable roaming for this person

☒ Create a Notes ID for this person

☒ Advanced

New Person

Registration Queue (local):

Migrate People... Import Text File...

✓ ✗

Click the other checkboxes too

- Also, make sure you click on
 - “Enable roaming for this person” option and...
 - “Create a Notes ID for this person”
 - If you don't, you'll be reminded to do so when you try to select the roaming options

Register Person -- New Entry

Basics

Provide name, password and other basic information for the new person. To view/edit additional registration settings, check the 'Advanced' checkbox below.

Registration Server... admin/servers/domlab

First name: Middle name: Last name: Short name:

Password: Mail system: Lotus Notes

Enable roaming for this person

Create a Notes ID for this person

Advanced

New Person

Migrate People...

Registration Queue (local):

Register Person -- New Entry

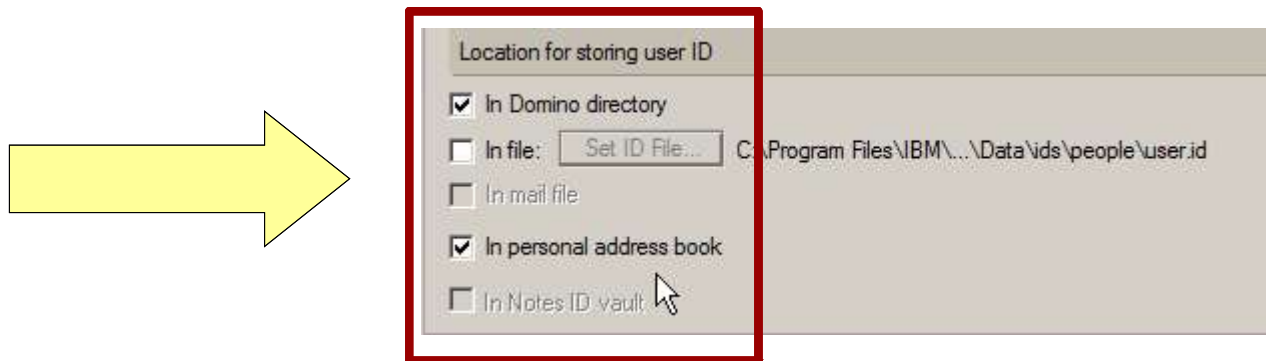
Basics

Roaming user settings are not available. You must select both the 'Enable roaming for this person' and 'Create a Notes ID for this person' checkboxes in the basics pane to enable roaming user settings.

You'll only see this if you do not check the “enable roaming” box

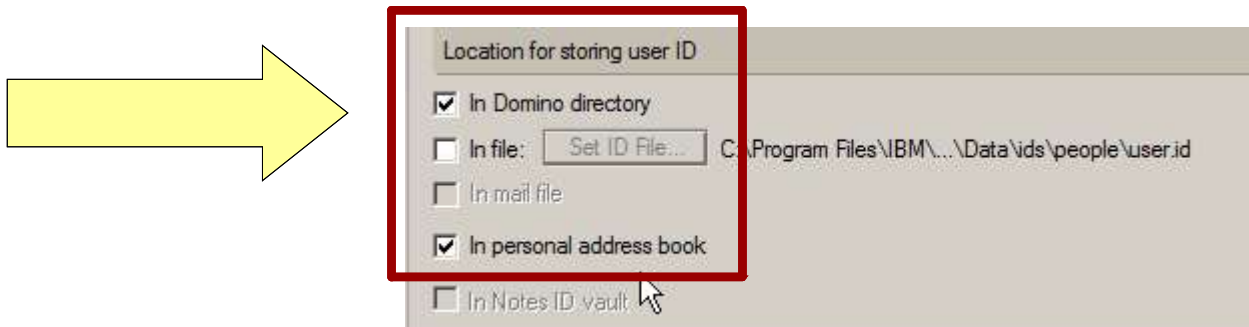
Roaming users and ID files

- When a roaming user logs on from any Notes client, they need to access their ID
- Their ID can be:
 - On the local file system
 - Not likely though – bad choice for roaming
 - From the Domino ID vault
 - Extracted from their Contacts application NAMES.NSF
- It depends on how the administrator configured the account



ID in the address book

- If you're not using and ID vault you must put the ID in the address book
 - If that bothers you, someone will probably have to have physical contact with their ID file and the user
 - There is a technote that says the ID in the address book is required for roaming user
 - There is a link at the end of the presentation to the technote
 - Be sure to put the ID in the personal address book where it can be used by the roamer



Proceed normally to create user details

- So far, this is just a normal user creation process, except you've selected "Enable Roaming"
 - When you've established the details click on the "Roaming" globe icon in the left side navigator

Register Person -- New Entry

Basics: Provide name, password and other basic information for the new person. To view/edit additional registration settings, check the 'Advanced' checkbox below.

Registration Server...: admin/servers/domlab

First name: Steve Middle name: Last name: Webster Short name: SWebster

Password: hLy\$mk0ke\$ Mail system: Lotus Notes Explicit policy: (No explicit policy assigned)

Organization policy: */DomLab

☒ Enable roaming for this person

☒ Create a Notes ID for this person

☒ Advanced

Registration Queue (local):

User Name ^	Registration Status ^	Date ^
-------------	-----------------------	--------

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A few options to consider

- Go to the roaming section
 - There are just a few options to deal with
 - Let's start with where to put the roaming files

Register Person -- New Entry

Supply roaming user settings for the selected people or person. Three roaming user files (personal address, bookmark and journal) will be created on the personal roaming folder shown below. The folder name must be unique on that server.

☒ Put roaming user files on mail server

☐ Roaming Server... admin/servers/domlab

Personal roaming folder: roaming\SteveWebster

Sub-folder format: FirstName LastName

☐ Create roaming files in background

Roaming Replicas...

Clean-up option: Do not clean-up

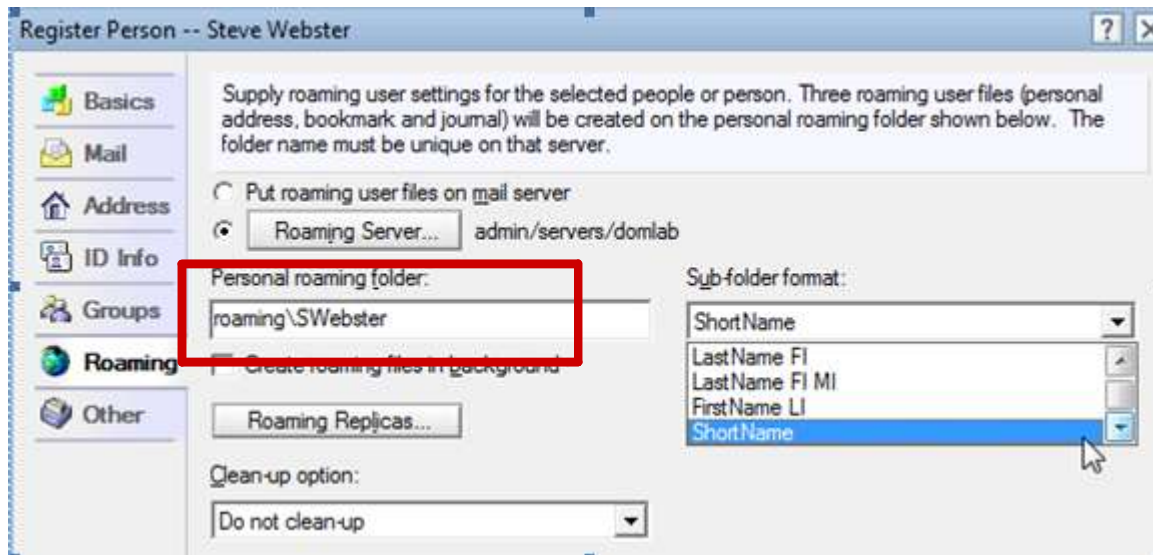
Where to put the roaming user's files

- Only have a few roaming users?
 - Keep it simple, store roaming user files on mail server
- If there are a lot of roaming users consider establishing special roaming servers
 - Select a roaming server that will always be available to your roaming user with considerations for:
 - Remote users coming in over VPNs
 - Wide area network connections
 - And in some situations even dial-up users



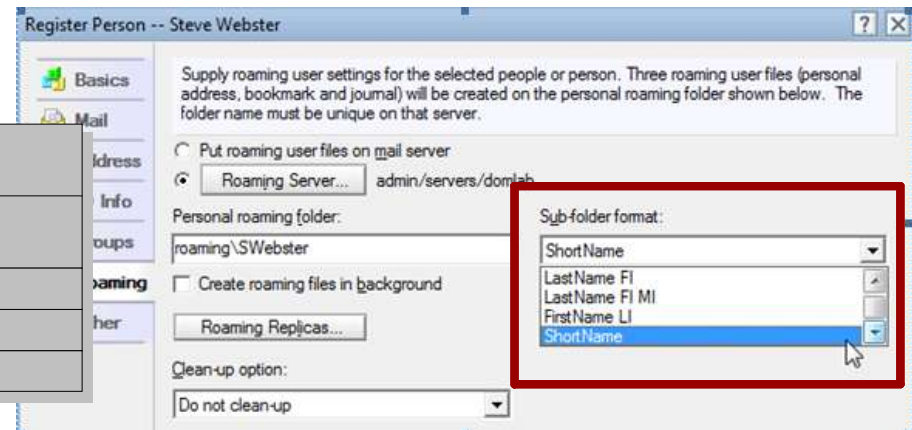
Folder location for roaming files

- Start with selecting a base level folder where all roaming files will be stored
 - It's safe to use the default “roaming” base folder level



Folder location each user's files

- Select a folder location that is unique for each user
 - Lotus provides 10 styles for roaming folder names
 - Shortname is generally gives you a good chance of maintaining uniqueness across an enterprise

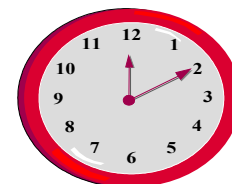
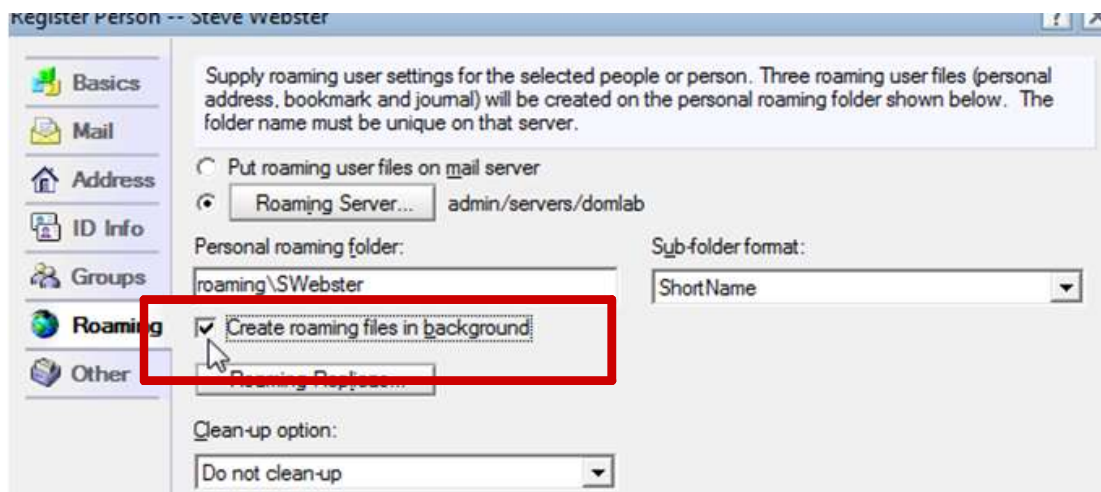


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Do you like to wait?

- If have a slow connection to the server, consider letting the AdminP process handle the creation of the roaming user files
 - It makes the registration process go faster
 - You can get on with your life and perhaps go home a little earlier than normal



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Special considerations for clusters

- Roaming files can be clustered
 - Roaming user files can be created on a cluster partner server during registration
 - This is a great idea and leverages the clusters already in your environment
 - Roaming functionality totally rocks on clusters

Create clustered roaming files

- Be sure to modify your user creation documentation to include the creation of the roaming files on the cluster mate
 - The registration process will automatically offer you the cluster mate server when you check the “Create roaming file replicas” box

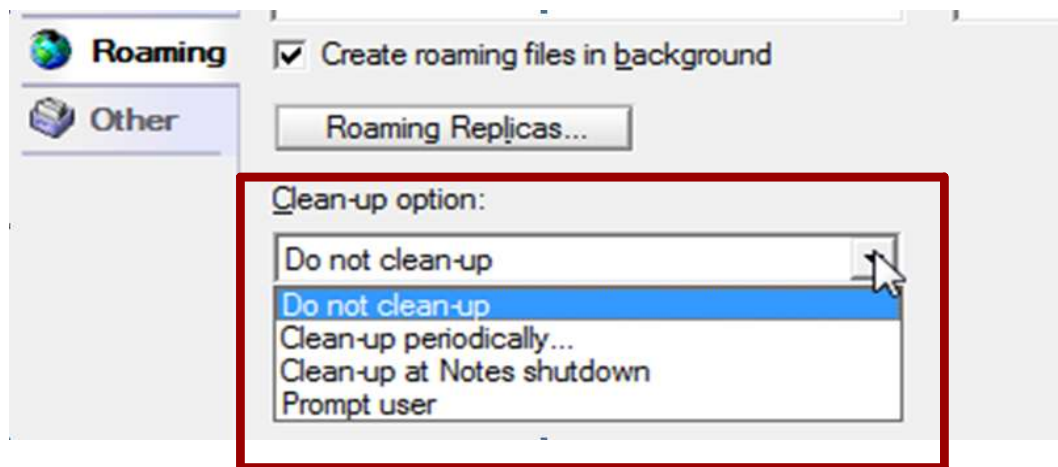


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Cleaning up roaming user files

- To “clean-up” means deleting all of the databases in the user's directory
 - Clean-up should only happen on workstations that contain a multi-user install
 - The user would likely have a single user version of the Notes client installed on some primary machine
 - Clean-up is typically used in a kiosk-style deployment



Options for clean-up

- Here are the cleanup options:
 - Do not clean-up
 - This is the default setting
 - Roaming user data will never be deleted from the IBM client workstation where the user roamed
 - Clean-up periodically
 - Enables the "Clean up every N days" field
 - Specify the number of days that should pass before roaming user data is deleted from the Notes client workstation

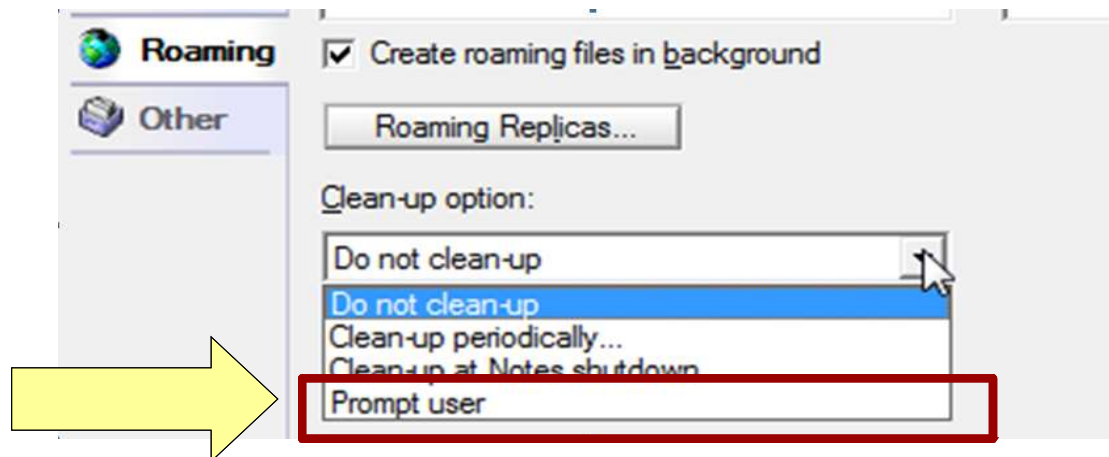


Clean-up option:

Clean-up periodically... Clean-up every 5 days

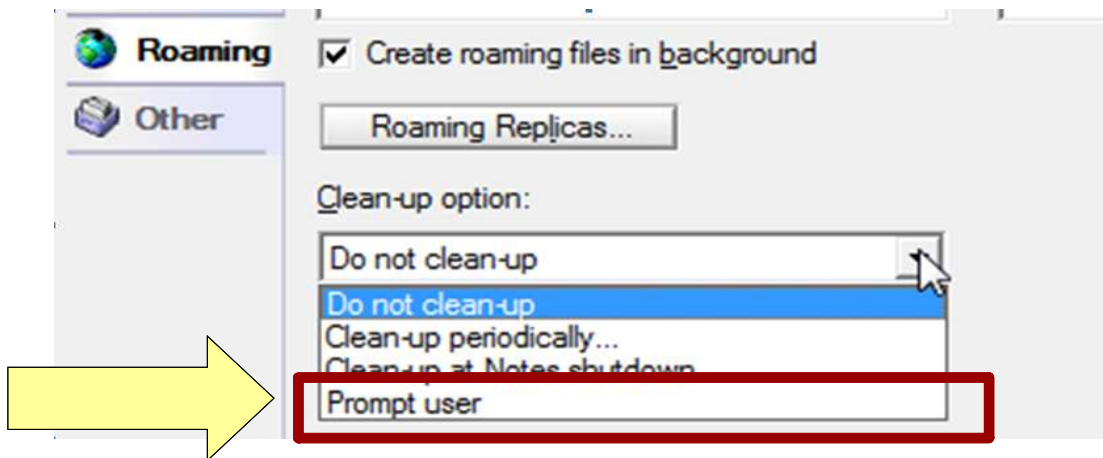
More about options for clean-up

- Clean-up at Notes shutdown
 - Roaming user data is deleted from the Notes client workstation immediately upon Notes shutdown
- Prompt user
 - The user is prompted on exiting the client as to whether they want to clean up their personal files
 - The user needs some training for this option to be successful



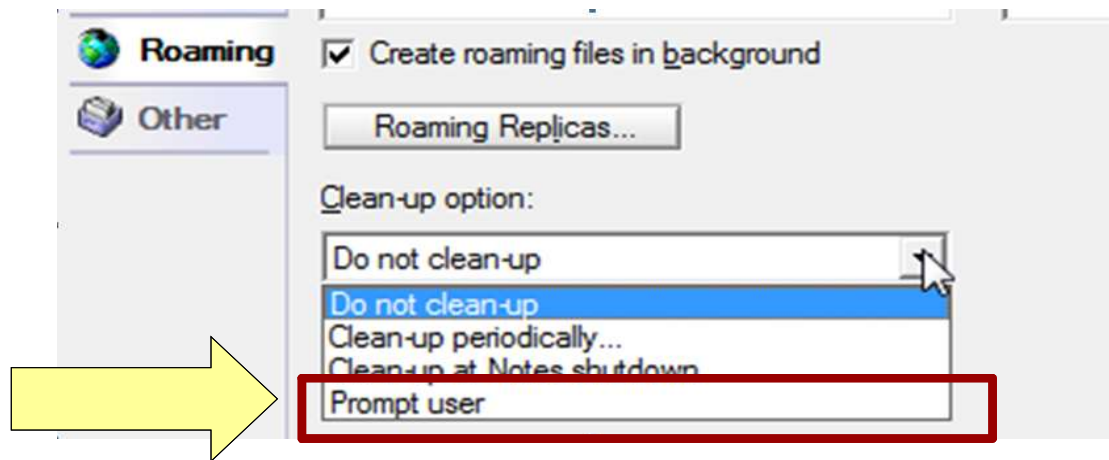
Prompting the user

- If the user says Yes to the clean-up question
 - The entire data directory on that client is deleted
- If the user says No
 - User is prompted: do they want to be asked again on that client?



Question: do you want to be asked again?

- When the user is prompted: do they want to be asked again on that client?
 - If the user selects No, the user will never be prompted again on that workstation
 - If the user says Yes to the second question, they will be badgered next time they exit the client on that workstation

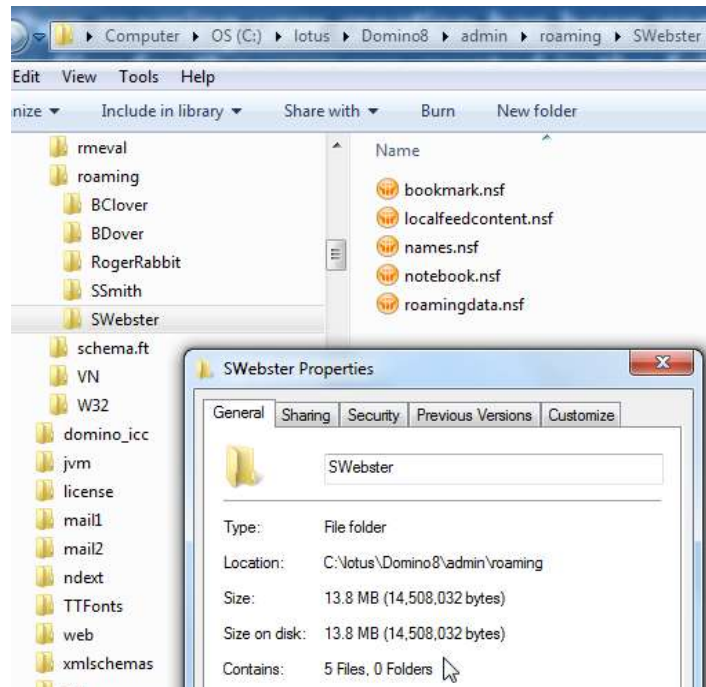


Agenda

- **Creating a user who roams on Domino server**
 - Beginning the creation of the user
 - Determining the location of the roaming user files
 - Creating roaming files in foreground or background
 - Taking advantage of Domino clusters
 - Understanding the options to cleanup workstations
 - **Looking at the changes on Domino when a roaming user is created**

Completing creation of the roaming user

- When roaming user creation has been completed, the files for the user are created in the folder on the Domino server you specified
 - They use about 15 MB of disk space

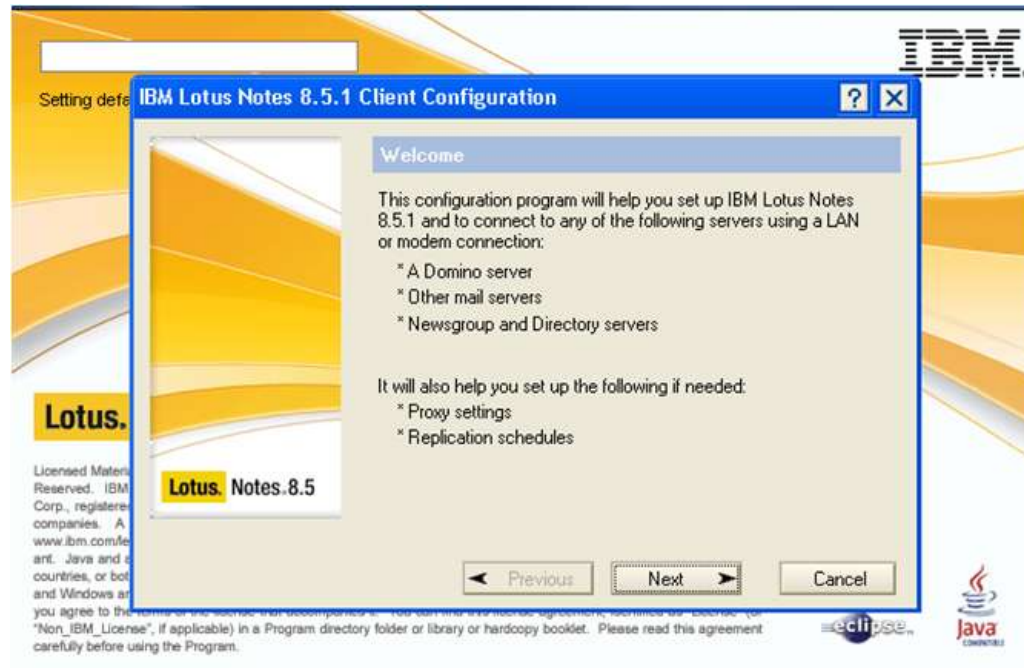


Agenda (cont'd)

- **What's it like to be a roaming user on Domino?**
 - **What happens when a roaming user starts the first Notes client on workstation #1**
 - What does the roaming user end up with?
 - Understanding what happens to Notes client replication
 - Following the roaming user as desktops and bookmarks are changed
 - What happens when the roaming user moves to workstation #2

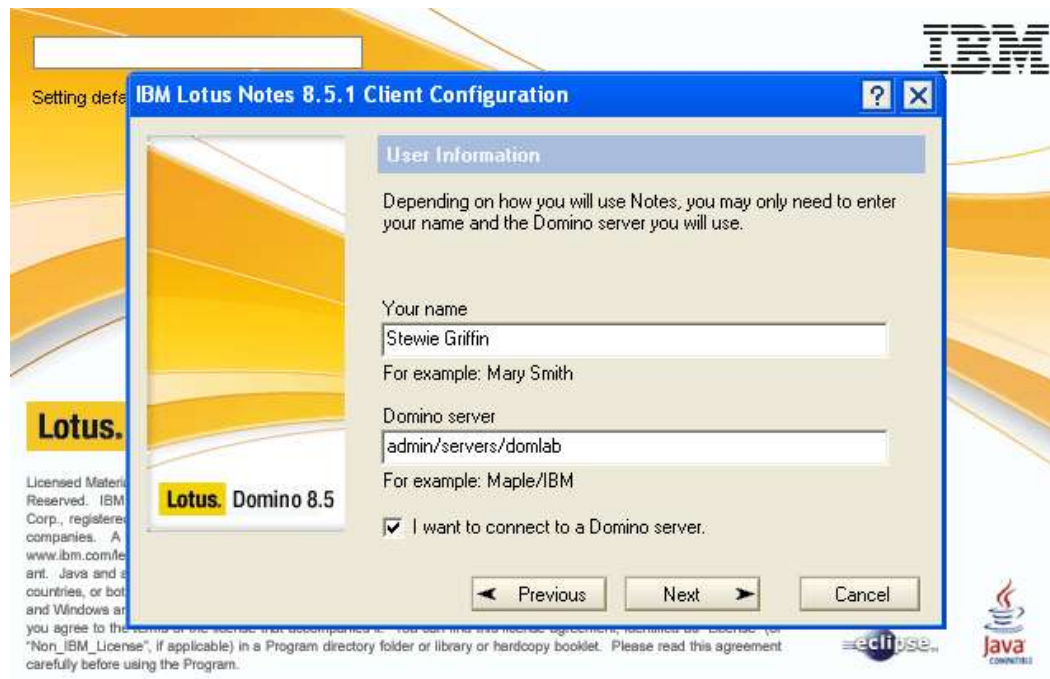
Roaming user makes the first connection

- The newly created roaming user sits down at the first multi-user workstation and starts Notes
 - Since the user has never started Notes before, the Notes client setup process kicks off



The setup process prompts for user info

- The user is prompted for their username and mail server name



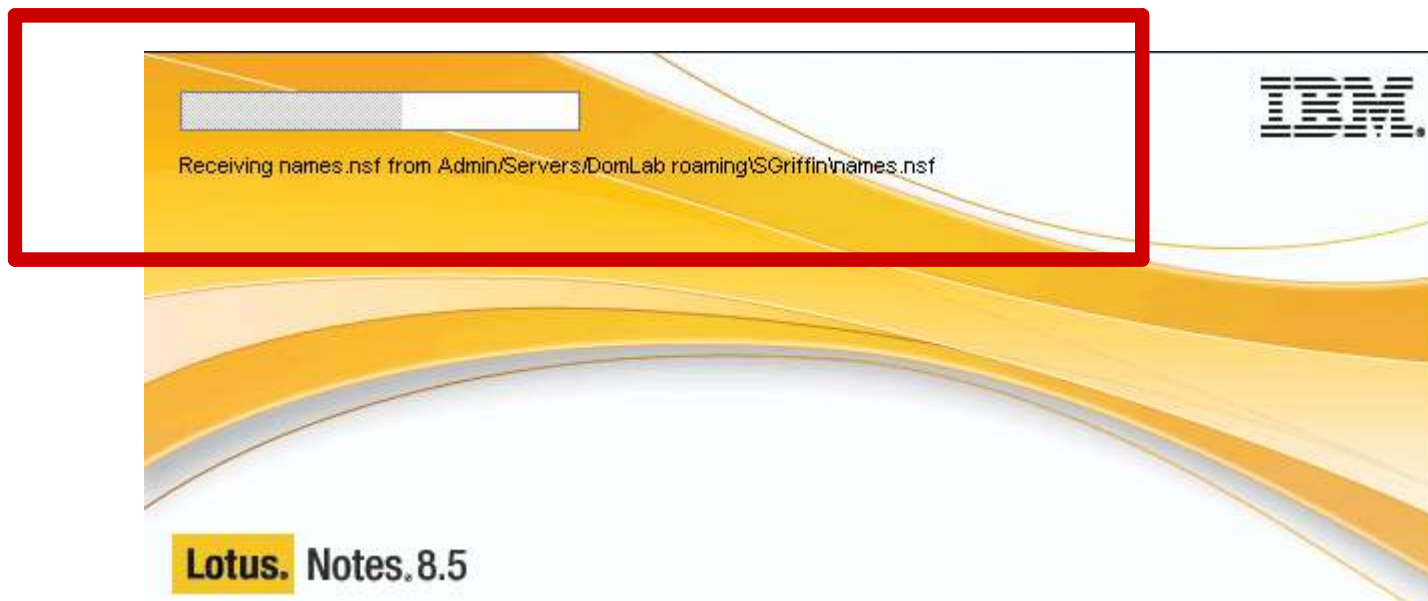
First time authentication

- It's all normal so far, as the user enters their Notes password for authentication



Things are now a little different

- The splash screen indicates that the roaming user files are being replicated from the Domino server
 - It takes a minute or two for this to complete



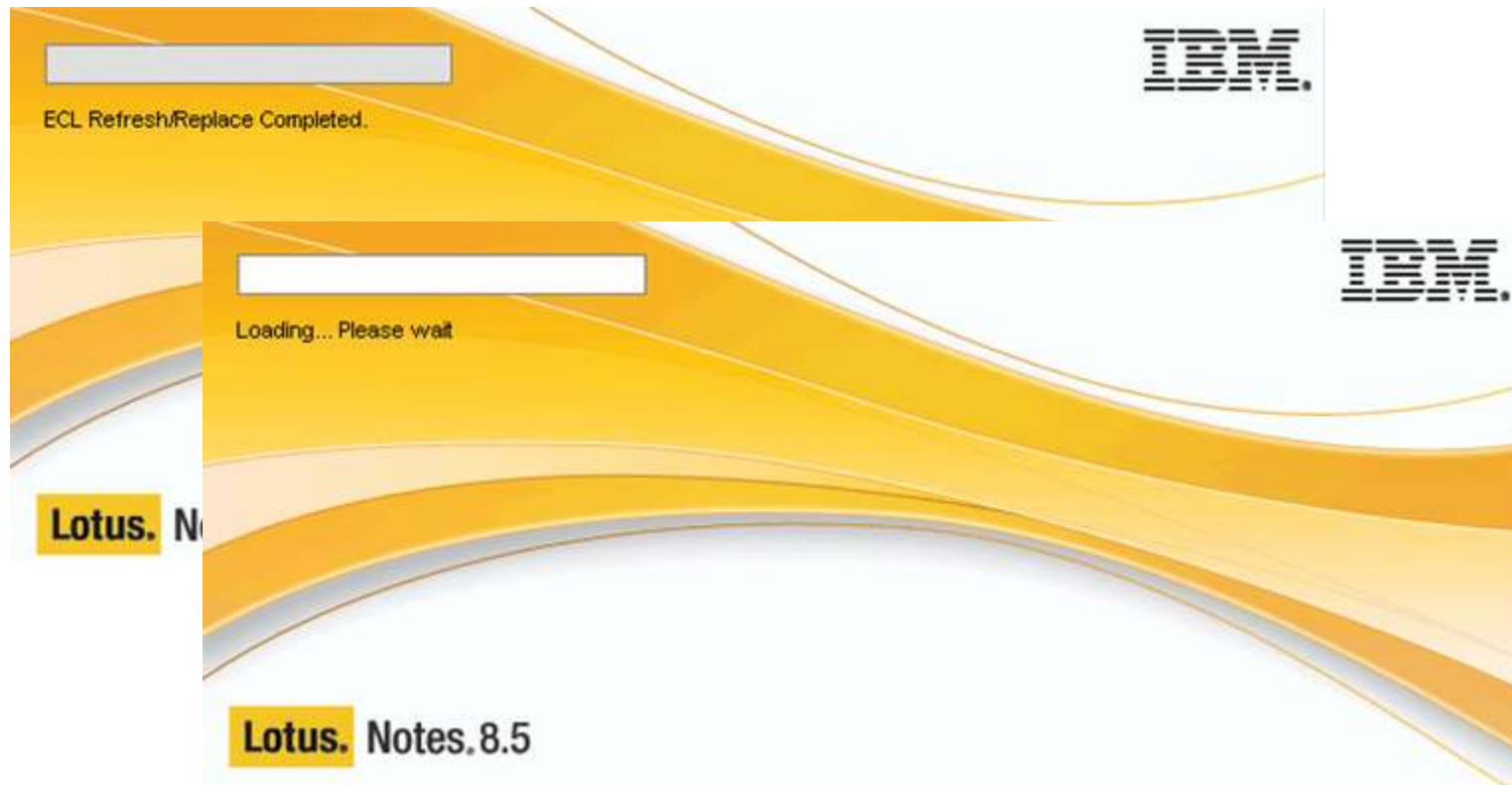
And setup continues

- Normal setup continues and prompts the user for any additional setup options



Almost done

- A few more splash screens later and setup is just about



The end of setup

- The roaming user reaches the end of the setup process is brought to the initial “Getting Started” page

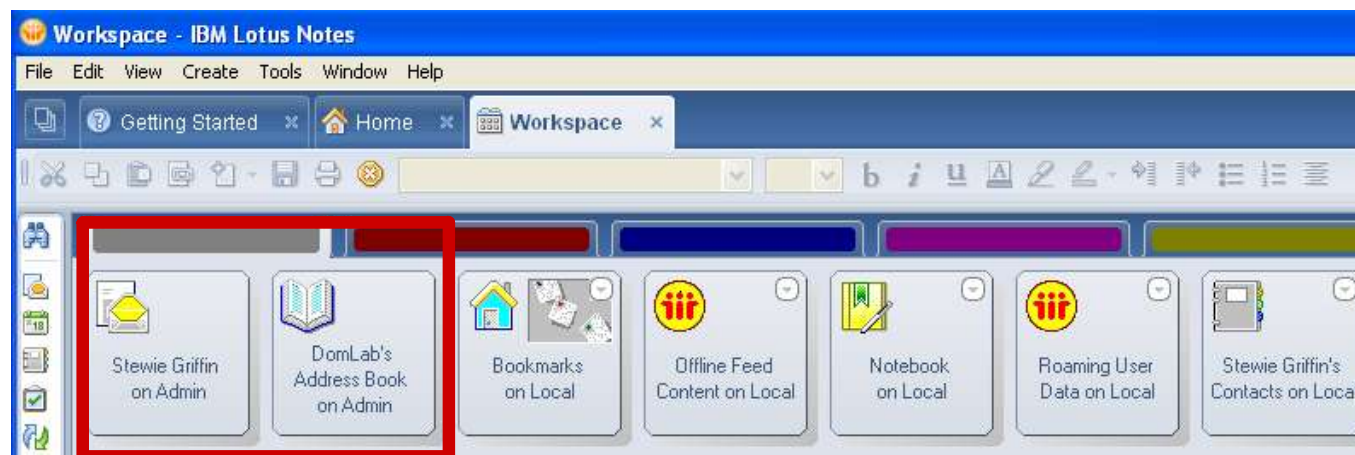


Agenda (cont'd)

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 - What happens when the roaming user moves to workstation #2

What does the roaming user end up with?

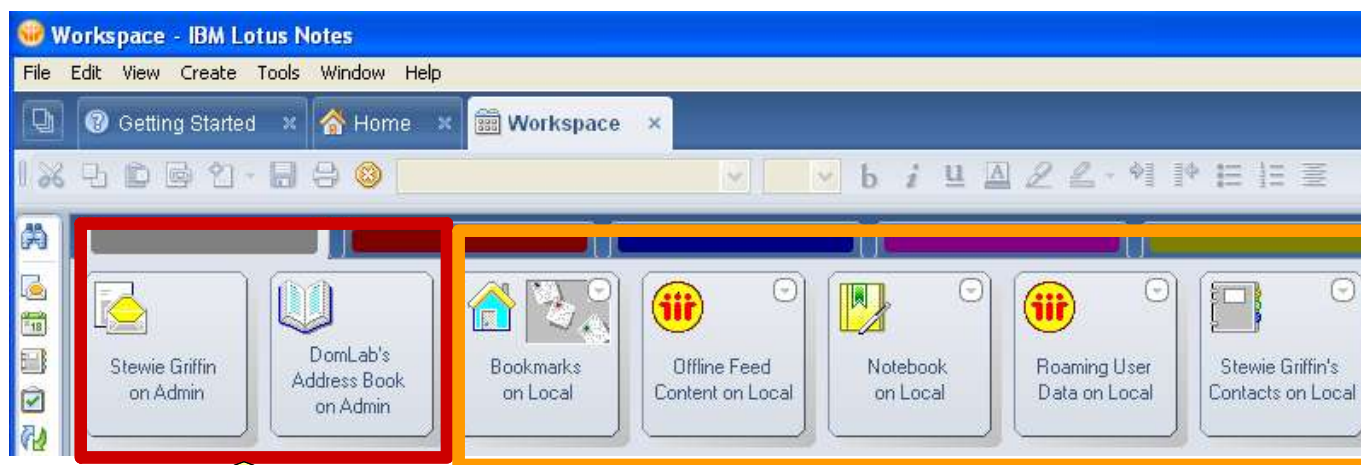
- At the completion of the setup of the first workstation, the roaming user has this desktop
 - Two icons for server based applications
 - An icon for the user's mail file the domain's address book



**Server
DB icons**

Roaming setup complete

- Plus the roaming user has five icons each of which represent a local and server replica
 - Bookmarks, feed content, notebook, roaming user data and the user's contacts



**Server
DB icons**

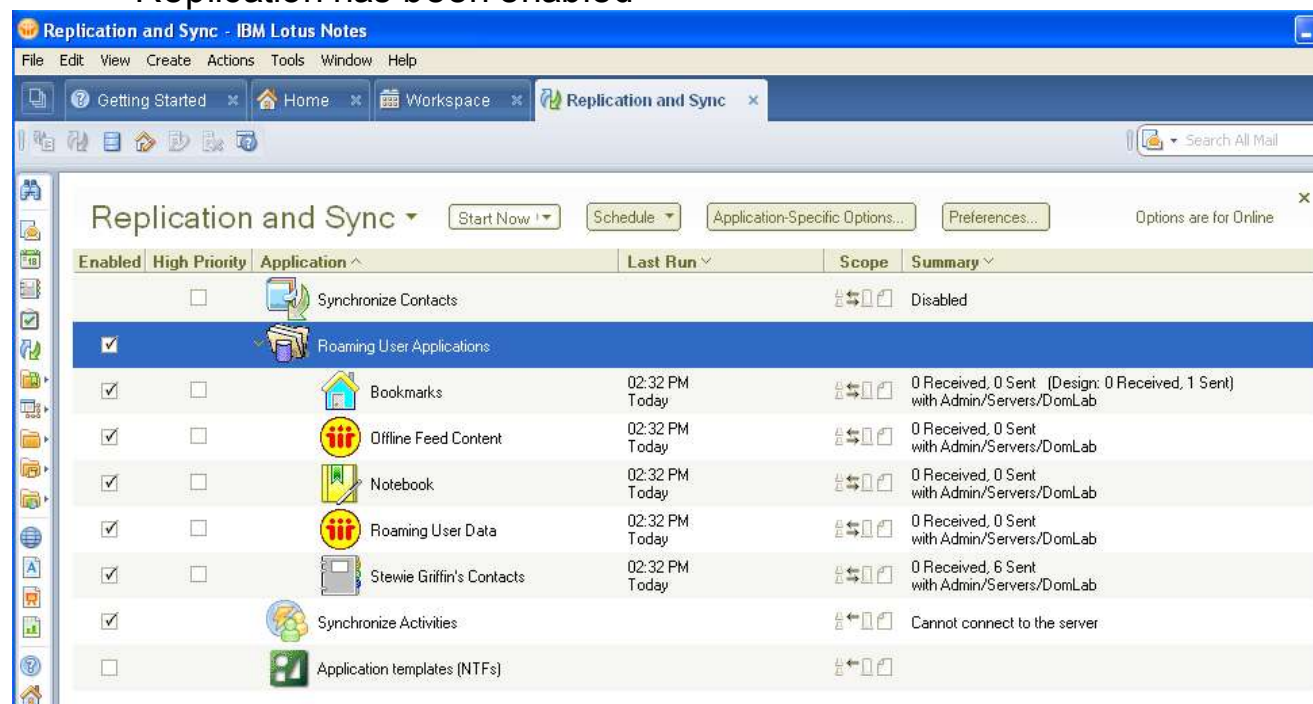
**Local Replica
and Server
DB Icons**

Agenda (cont'd)

- **What's it like to be a roaming user on Domino?**
 - What happens when a roaming user starts the first Notes client on workstation #1
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 - **Understanding what happens to Notes client replication**
 - Following the roaming user as desktops and bookmarks are changed
 - What happens when the roaming user moves to workstation #2

Changes to the replicator page

- The roaming applications have been added to the replicator page
 - Replication has been enabled



Default replication schedule

- A replication schedule has been created
 - Normal & high priority dbs have the same 60 minute interval
 - Replicate when the client is started
 - Prompt for replication on shutdown

Normal

High priority

Prompt user on shutdown

Replication/Sync Schedule for location Online

You can set a different replication/sync schedule for each location.
The schedule you set now applies to the location name you see in the status bar.

Normal-priority schedule

☒ Replicate/Sync at this interval for normal priority

Daily from: 08:00 AM to: 10:00 PM

Repeat every (minutes): 60

Days of the week: ☒ Sunday ☒ Monday ☒ Tuesday
☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday

High-priority schedule

☒ Replicate/Sync at this additional interval for high priority

Daily from: 08:00 AM to: 10:00 PM

Repeat every (minutes): 60

Days of the week: ☒ Sunday ☒ Monday ☒ Tuesday
☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday

Other triggers

☒ Replicate/Sync when I start the client
☐ Prompt me

☒ Replicate/Sync when I shut down the client
☒ Prompt me

OK Cancel

A replication tip for roaming users

- Remember that this replication setup is the initial setup for the roaming user
 - Consider what happens when other databases are added that should replicate
- There is only one replication schedule
 - That means that replication will also occur on startup and shutdown for other databases that don't replicate through the Roaming User Server
 - Users may want to set some databases such as Bookmarks, as high priority so that they replicate more frequently
- This will reduce replication time during shutdown

Agenda (cont'd)

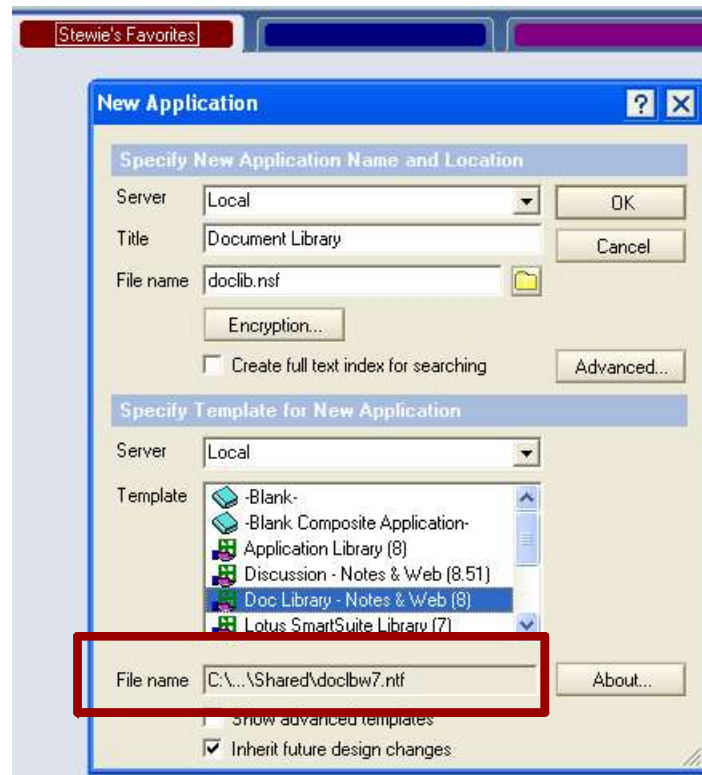
- **What's it like to be a roaming user on Domino?**
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 - **Following the roaming user as desktops and bookmarks are changed**
 - What happens when the roaming user moves to workstation #2

The roaming user will make changes

- Our roaming user will make the following changes
 - Dock the open list
 - Add the server based icon for the CATALOG.NSF to the desktop and bookmarks it
 - Label another tab, create a local replica of the document library application and bookmarks it
 - Adds a document to the local replica of the journal

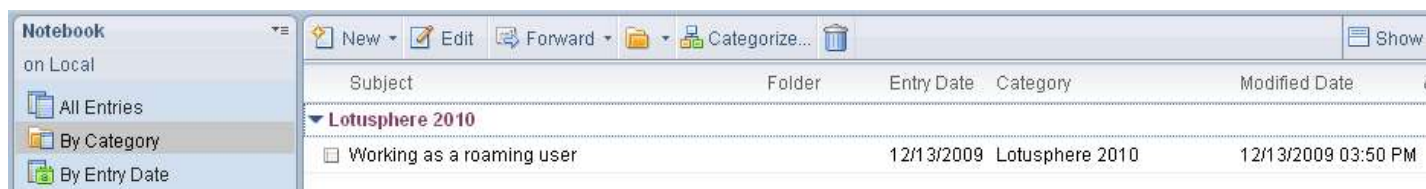
Uses template from shared area

- When our user creates a document library, the template comes from the shared area on the multi-user client



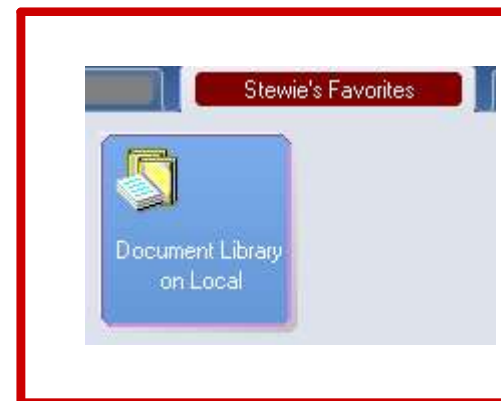
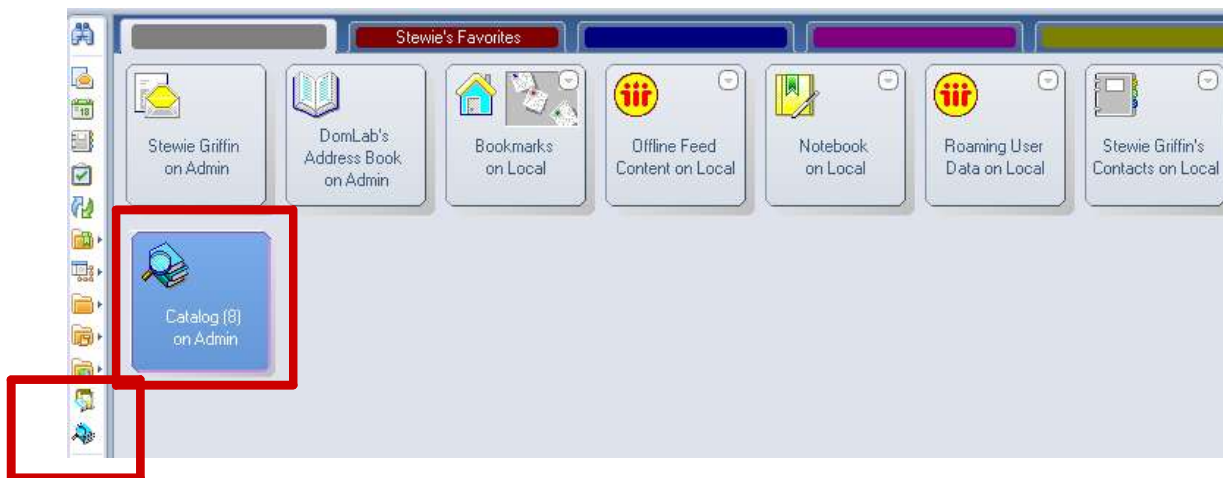
Document added to journal

- A document has been added to the local replica of the journal



Changes to the roaming desktop

- After all the changes are made, the roaming user's desktop will look like this
 - With 2 added bookmarks, 1 server file added and one local database created
- Then the user logs off



Leaving the Notes client

- When the roaming user exits the Notes client, a prompt displays
 - It asks the user to “send data to servers” to update the changes made to the local database
 - Users might require training to understand that this is the most important part of being a roaming user
 - They must update servers or their data will be different on workstations they roam to

This is very important!
Users must click “Yes”

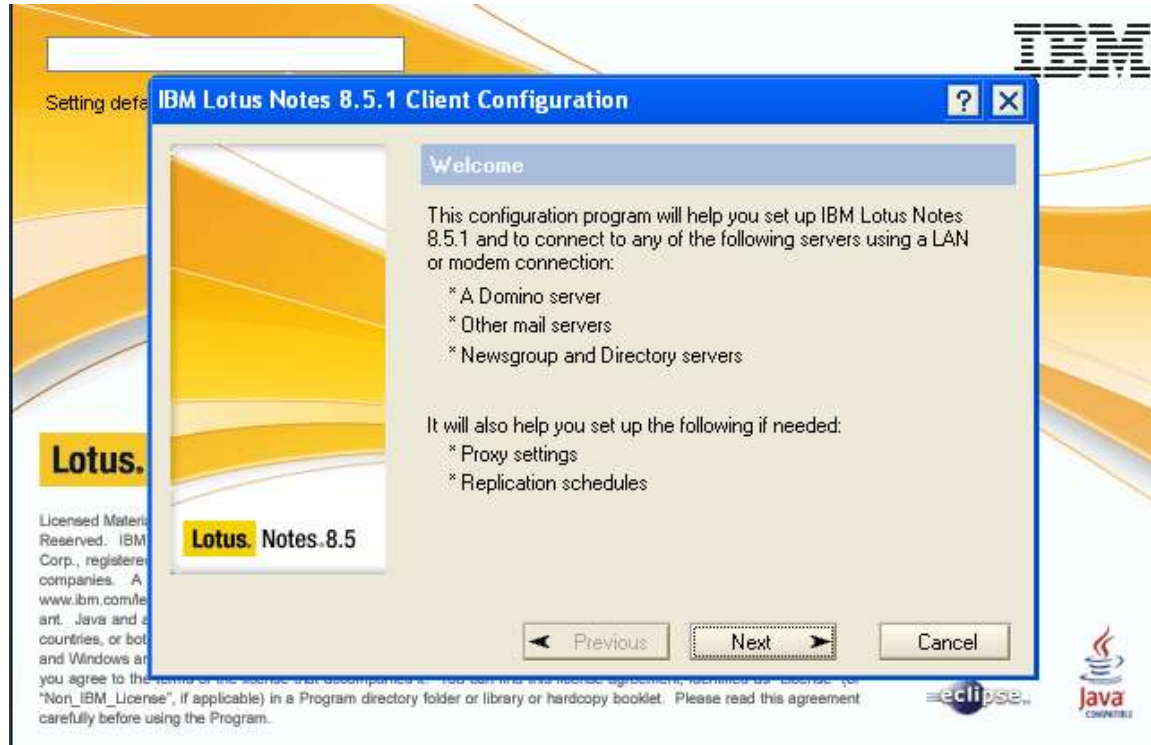


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 - **What happens when the roaming user moves to workstation #2**

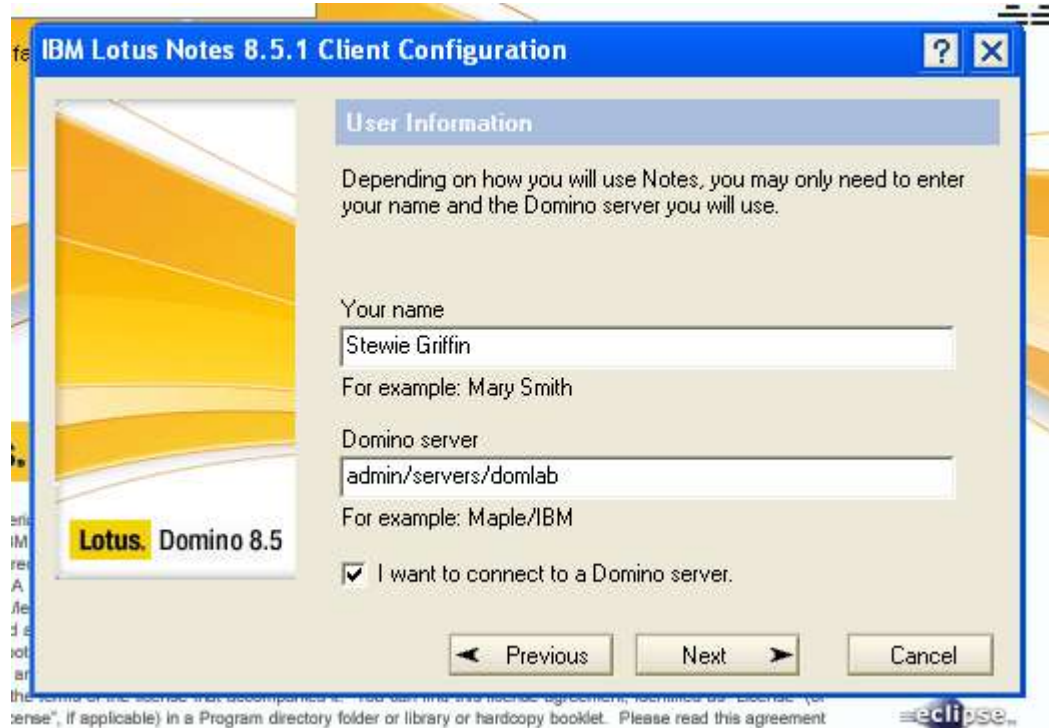
Roaming to a second workstation

- The user moves on to the second workstation and goes through setup



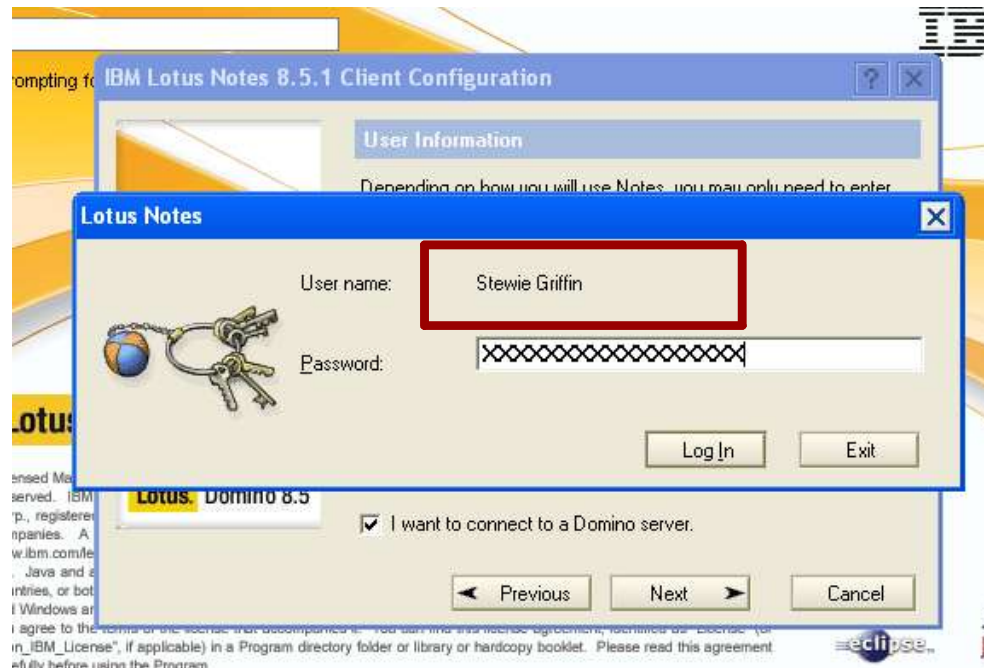
Prompted for setup

- Enters user name and server name



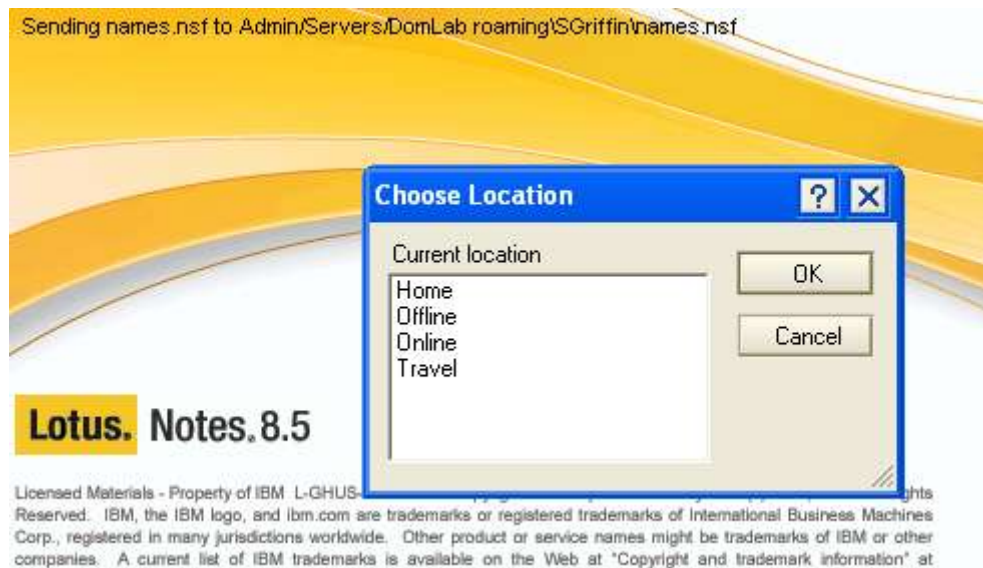
Authenticates on the second workstation

- Note that after the first setup, the roaming user seems to be authenticating using HTTP login
 - No organization is displayed, only the common name



User is now prompted for a location

- The user's contacts application has already been set up at the first workstation
 - The user is prompted for a location



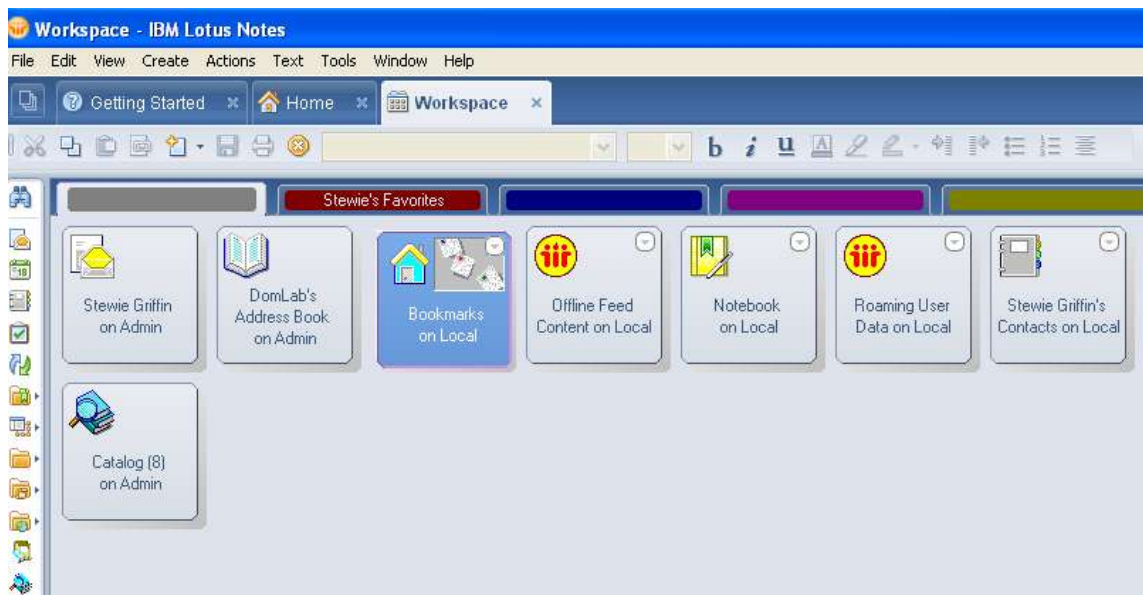
Roaming files are downloaded

- Roaming user's files are downloaded from the server



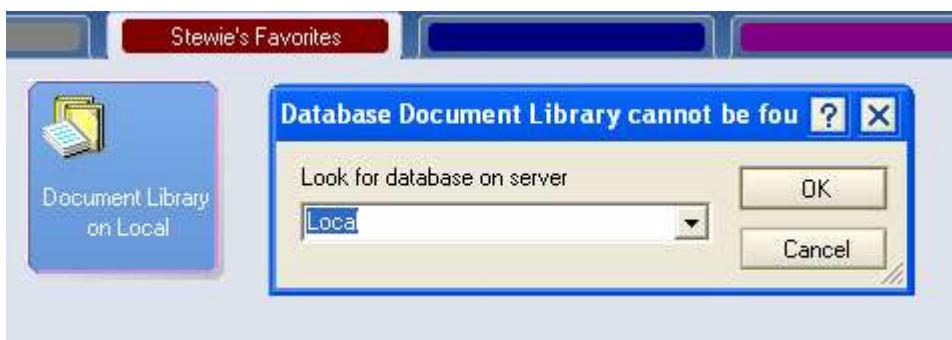
Landing on workstation #2

- The roaming user is now on workstation #2, which is almost exactly like workstation #1
 - The user interface has the bookmarks, the tab
 - Almost everything is the same



Things work well

- On workstation #2, all roaming file icons can be clicked and applications can be opened
 - The icon and bookmark for the server-based catalog can be clicked and opened
- The only item that doesn't work is the document library that was created on workstation #1
 - It was created locally and does not roam
 - And how could that work, really!



Agenda (cont'd)

- **Making more changes to the roaming user interface**
 - **Changing the roaming user's sidebar**
 - Adding the Lotus Learning plug-in
 - Installing a Google Gadget currency converter
 - Logging into Sametime
 - Subscribing to a feed in the feedreader
 - Logging off as a roaming user
 - Examining what roamed from workstation #2

Let's make more changes

- The sidebar roams, so lets make some changes to it and roam back to workstation #1
 - Add the Lotus Learning Plug-in
 - Add a gadget to convert currency
 - Connect to a Sametime server
 - Add content to the feed reader

Agenda (cont'd)

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Installing the Lotus Learning plug-in

- First, enable widgets in user preferences
 - They are disabled by default



Drop the XML into widgets

- Browse to the Domino Wiki
 - <http://www-10.lotus.com/ldd/dominowiki.nsf/dx/learning-plug-in-for-ibm-lotus-notes>
- Open the widgets panel on
- Drag the XML file to the widgets panel and drop it

Installing the Learning Widget

Use the following instructions to install the Lotus Learning Widget into the Lotus Notes 8.0.1 or higher sidebar.

Note: If you previously installed the Learning Plug-In for IBM Lotus Notes, you will need uninstall that plug-in prior to installing the Learning Widget. Refer to .

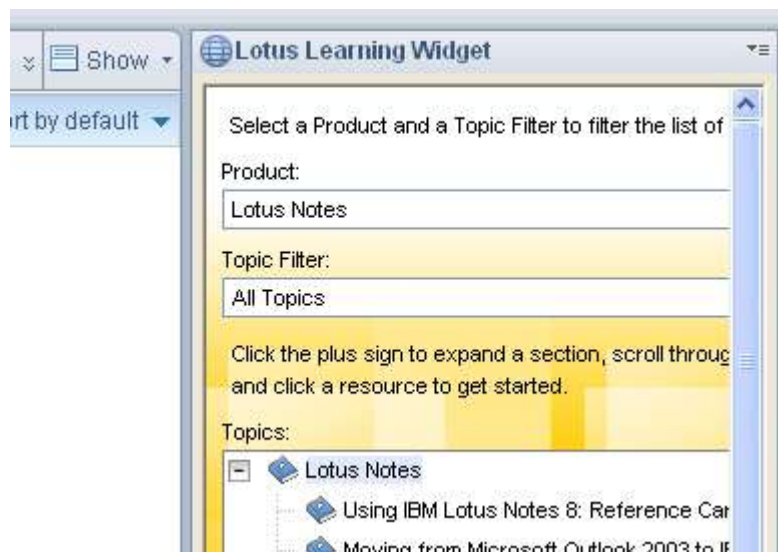
1. Start the Lotus Notes client.
2. Select **File > Preferences > Widgets**.
3. Check the **Show Widget Toolbar** and the **My Widgets Sidebar panel** field, and click OK.

Result: The My Widgets panel displays in the sidebar.

4. Drag this widget extension file to the My Widgets panel: [learning_widget_extension.xml](#)
5. If using a version prior to Notes 8.5.1, right-click the Lotus Learning widget icon in the My Widgets panel, and select **Open in > Sidebar Panel**.

Lotus Learning widget installed

- We have successfully installed the Lotus Learning Center in the sidebar



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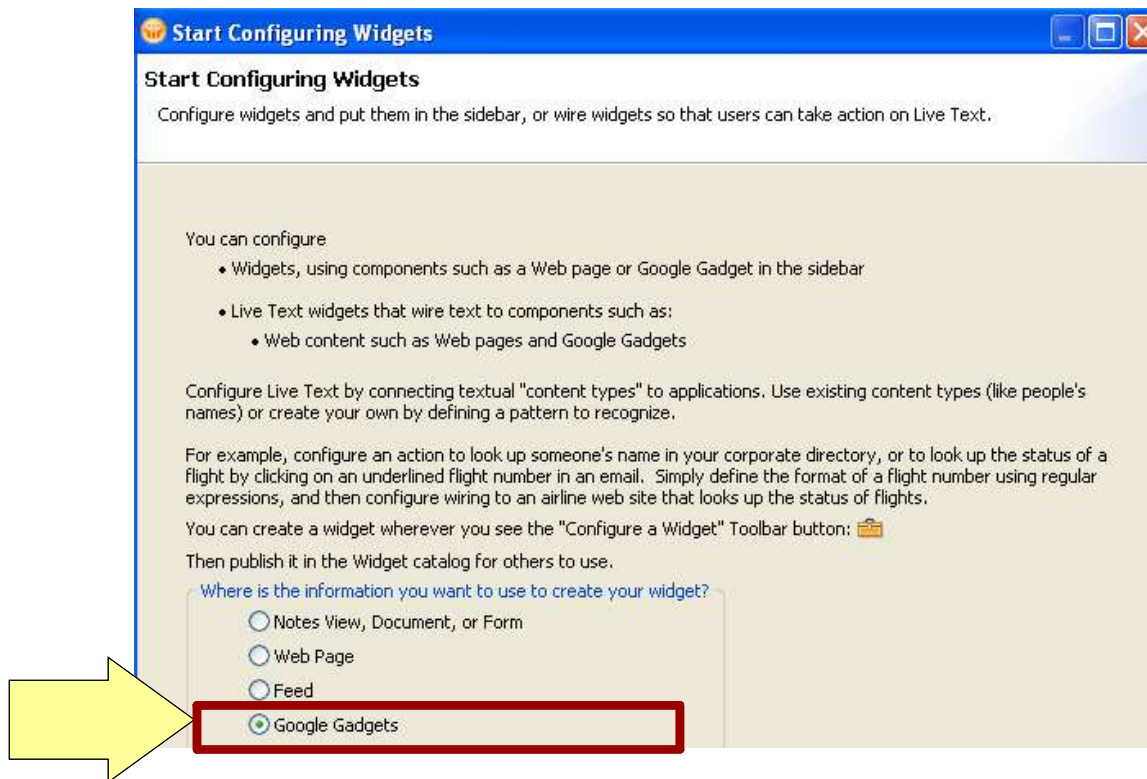
Grab a gadget

- Start by clicking the Getting Started with Widgets button



Select Google Gadgets

- Select Google Gadgets and click Next



Browse the gadgets

- Browse the Google Gadget directory



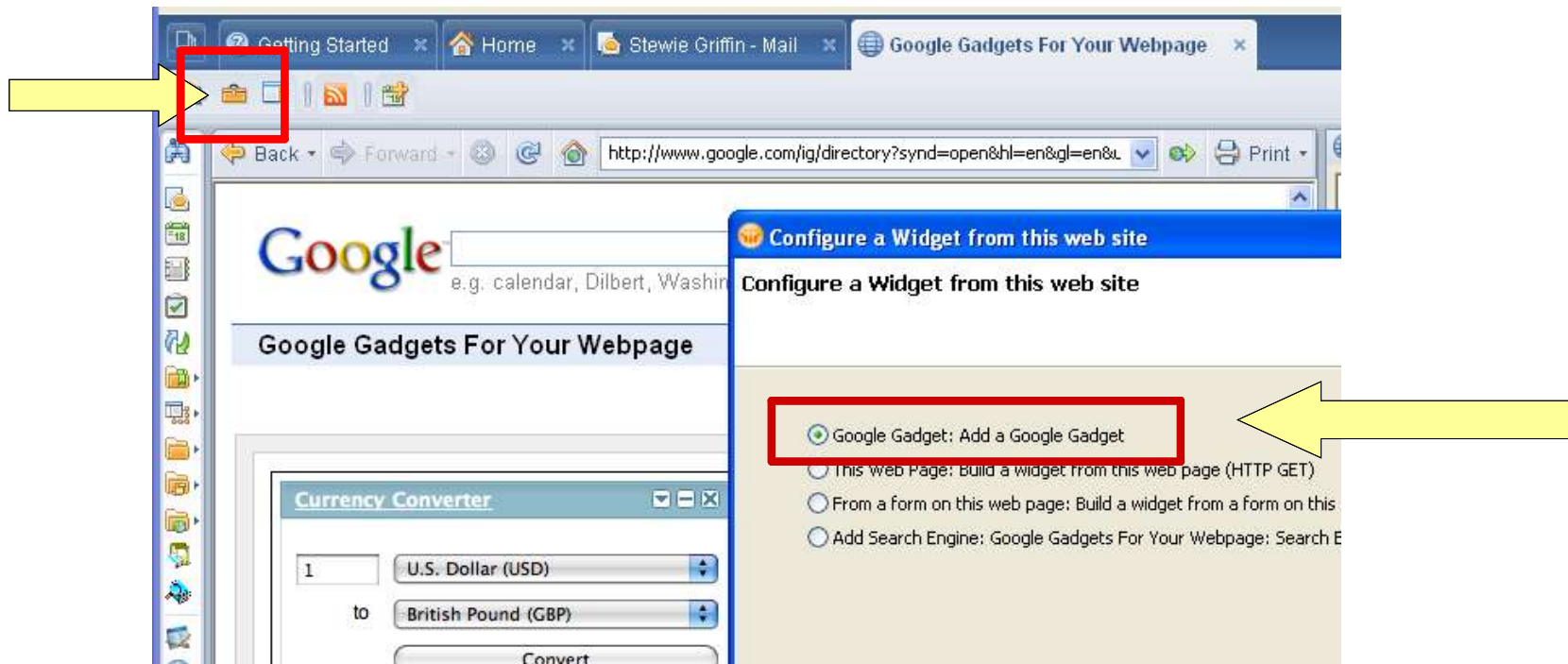
Search for currency converter

- We want to make a currency converter into a widget



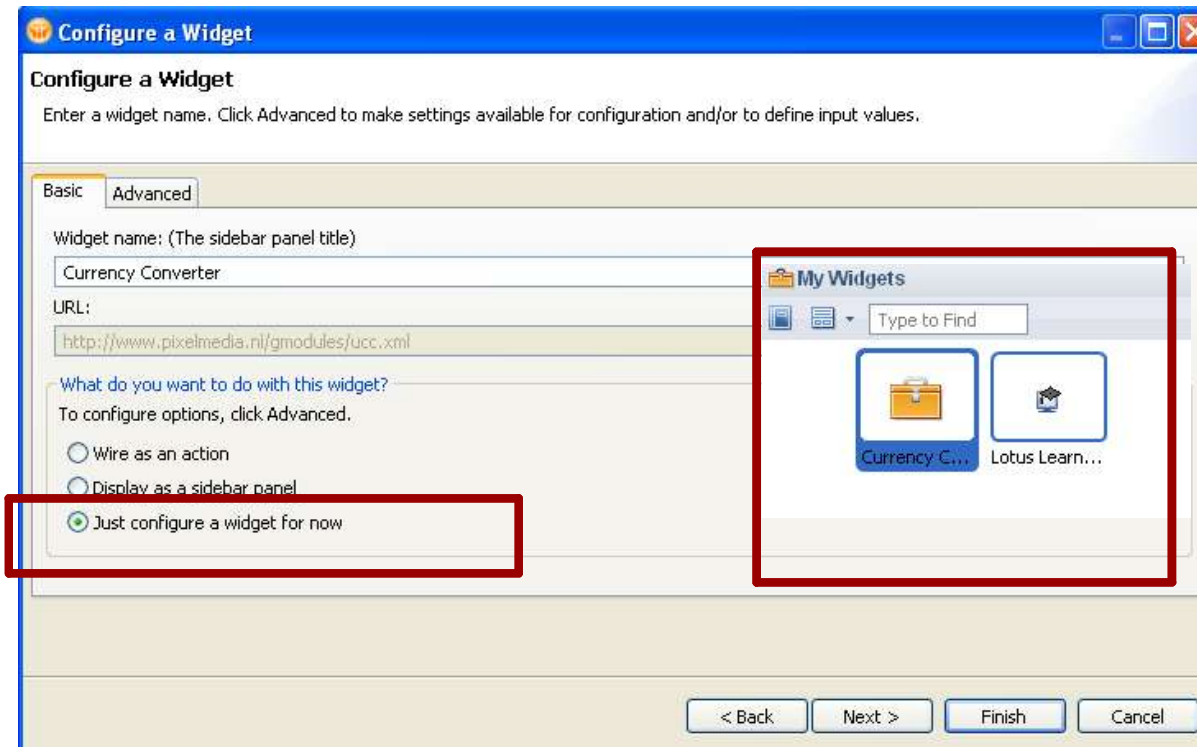
Configure the widget

- Click on the suitcase icon to configure the gadget



Just configure as a widget

- Configure as a widget for now

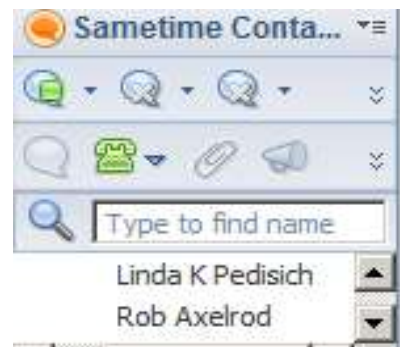


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Log in to Sametime

- Connect to the Sametime server
 - The login configuration will roam

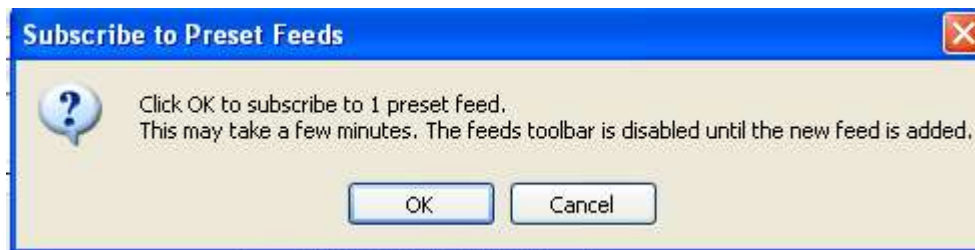


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 - Logging into Sametime
 - **Subscribing to a feed in the feed reader**
 - Logging off as a roaming user
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Subscribe to a feed

- We'll use the feed reader to subscribe to the preset feed that comes with the sidebar

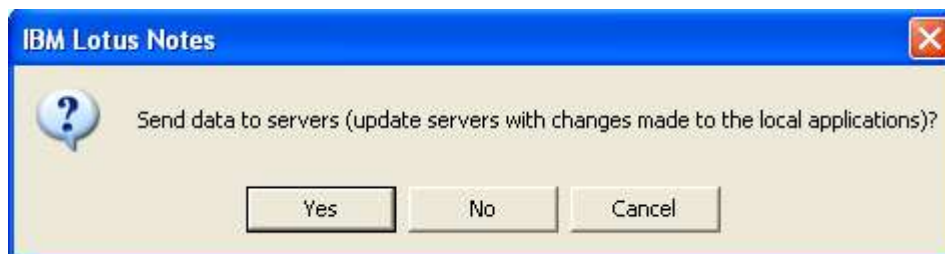


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 - **Logging off as a roaming user**
 - Examining what roamed from workstation #2

Log out

- Close Notes, and don't forget to replicate
 - That's how all the changes get back to the server

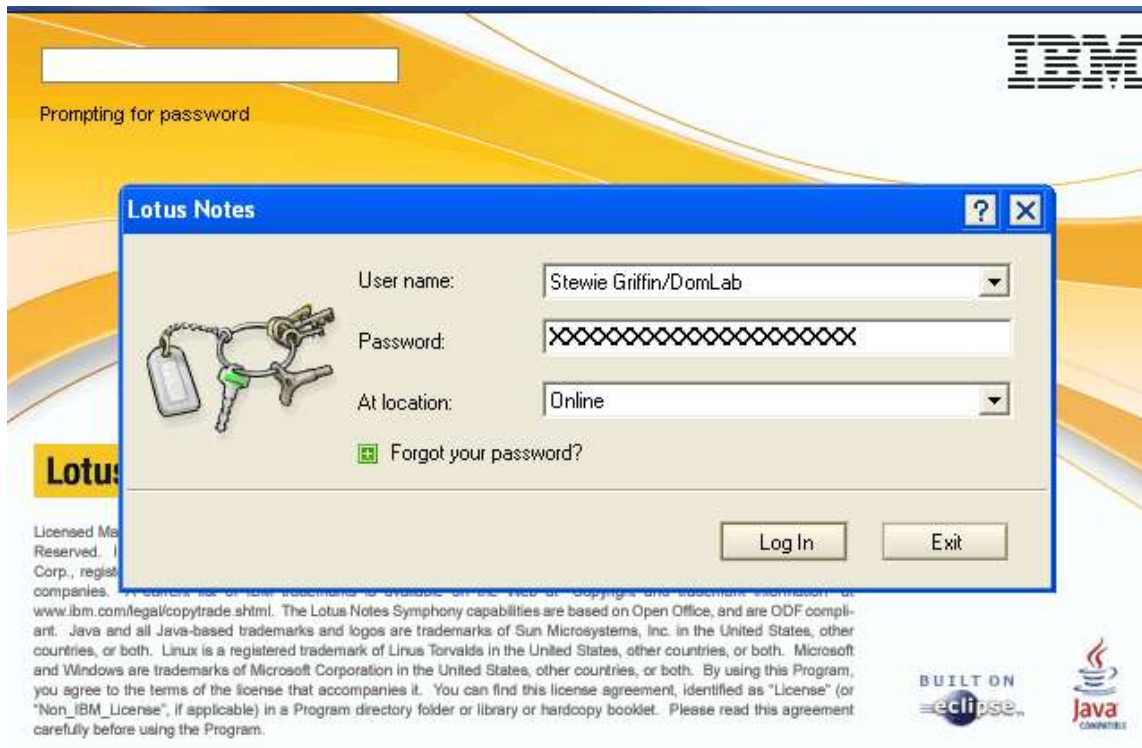


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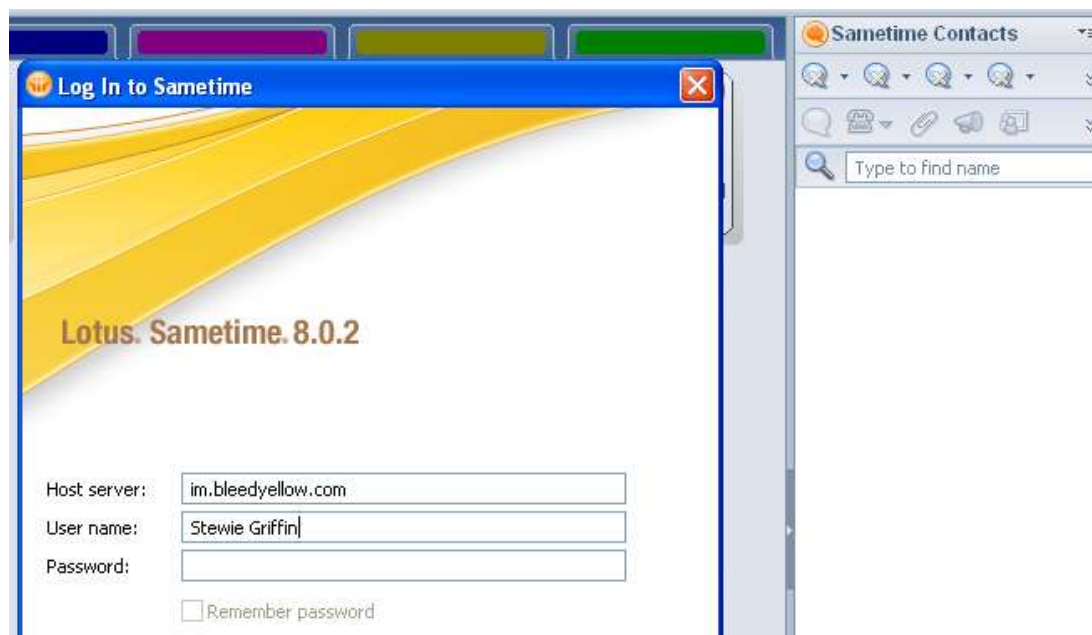
Reconnect to workstation #1

- It's just a normal login now with no setup



Sidebar roaming on workstation #1

- Sametime now has the account information that was entered on workstation #2



Feed reader roamed

- The feed we added followed us to workstation #1
 - It arrived in the Offline Feed Content application
 - LOCALFEEDCONTENT.NSF



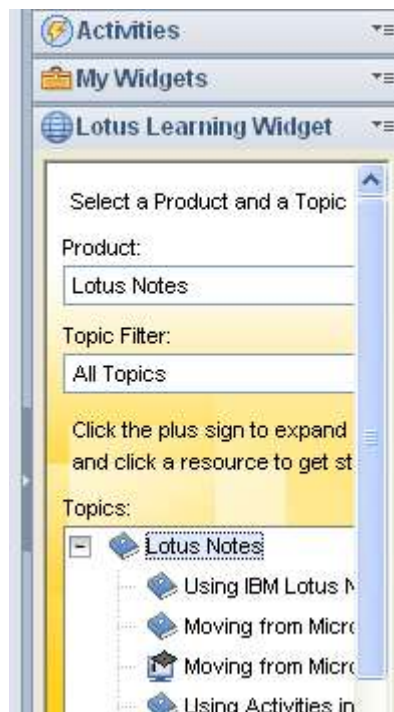
Currency converter widget

- The currency converter that was created as a widget roamed perfectly



The plug-in roamed

- The Lotus Learning plug-in we installed also made it to workstation #1



At some enterprises, all Notes clients are installed multi-user

- We have talked to many administrators who make almost all of their desktops multi-user systems because it is so easy to manage the environment
 - There is no need to visit a workstation to have a new user set up on it
 - The multi-user install takes care of the details

Some domains use the roaming user feature even though no one roams

- We've talked to a few administrators who told us that all users in the domain are roaming users
 - But most users only use a single workstation that is not installed multi-user
- These admins claim this configuration reaps benefits
 - There are always replicas of the NAMES.NSF and the other important files backed upon the server
 - It is really easy to set a user up on a different system

Agenda (cont'd)

- **Upgrading a normal user to a roaming user**
 - **Creating the normal user**
 - Normal user sets up a Notes client on workstation #1
 - Creating a NOTEBOOK.NSF for the normal user
 - Upgrading the normal user to roaming
 - Looking at what happens during the upgrade
 - Roaming user logs back onto workstation #1
 - User is upgraded to roaming user
 - Notes client is restarted
 - Upgraded user logs onto workstation #2
 - Downgrading a roaming user

This time, we create a non-roaming user to test with

- We need a user who is not a roaming user to see what happens when we upgrade a user
 - Leave the Enable Roaming box un-checked

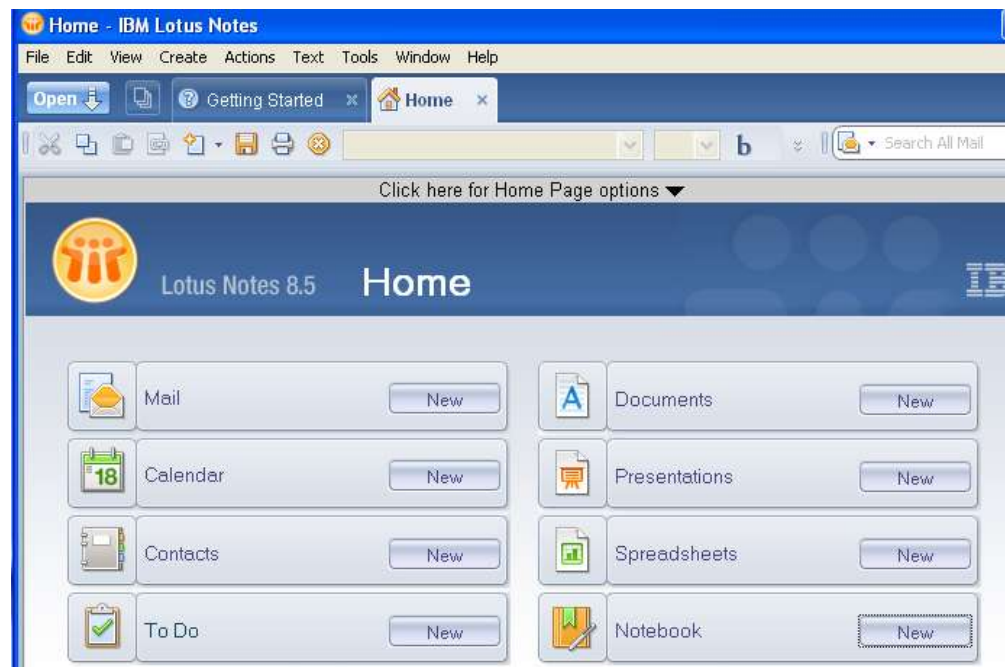
The screenshot shows the 'Register Person -- New Entry' dialog box. The 'Basics' tab is selected. The 'Registration Server' is set to 'admin/servers/domlab'. The 'First name' is 'Peter', 'Middle name' is empty, 'Last name' is 'Griffin', and 'Short name' is 'PGriffin'. The 'Password' is 'domlab', 'Mail system' is 'Lotus Notes', and 'Explicit policy' is '(No explicit policy assigned)'. The 'Organization policy' is '*DomLab'. The 'Enable roaming for this person' checkbox is unchecked and highlighted with a red box. The 'Create a Notes ID for this person' checkbox is checked.

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Setup completed

- We've gone through setup before
 - This time we'll go straight to the home page

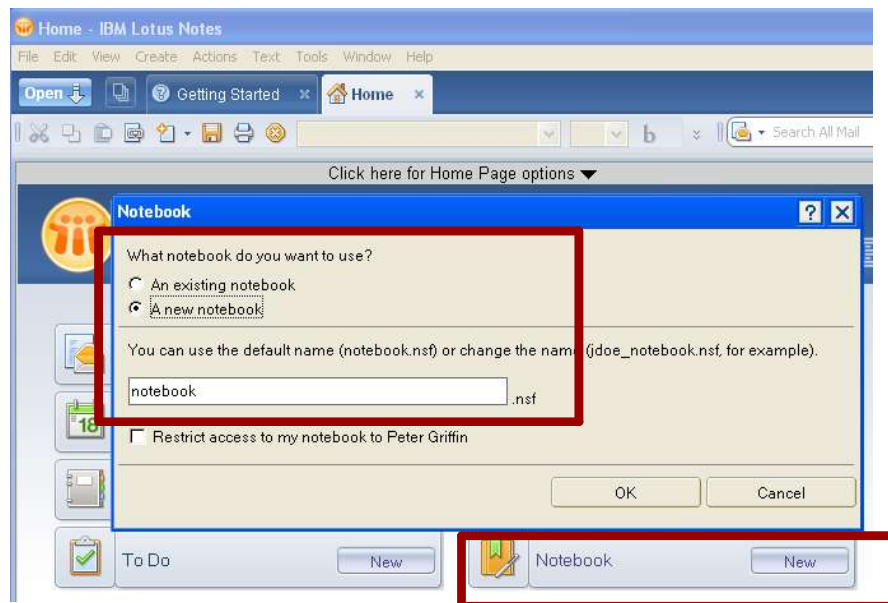


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No default NOTEBOOK.NSF was created for this user

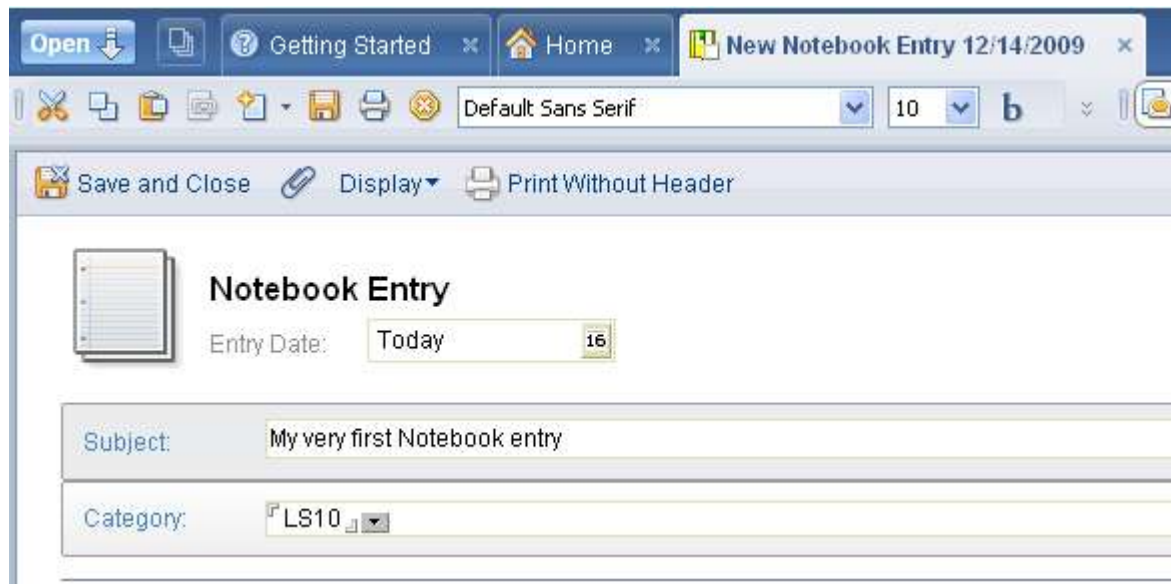
- When normal users are created, a NOTEBOOK.NSF is not created for them
 - We want this user to have a notebook application
 - This must be created by clicking the new notebook button on this home page



New Notebook Button

Notebook added

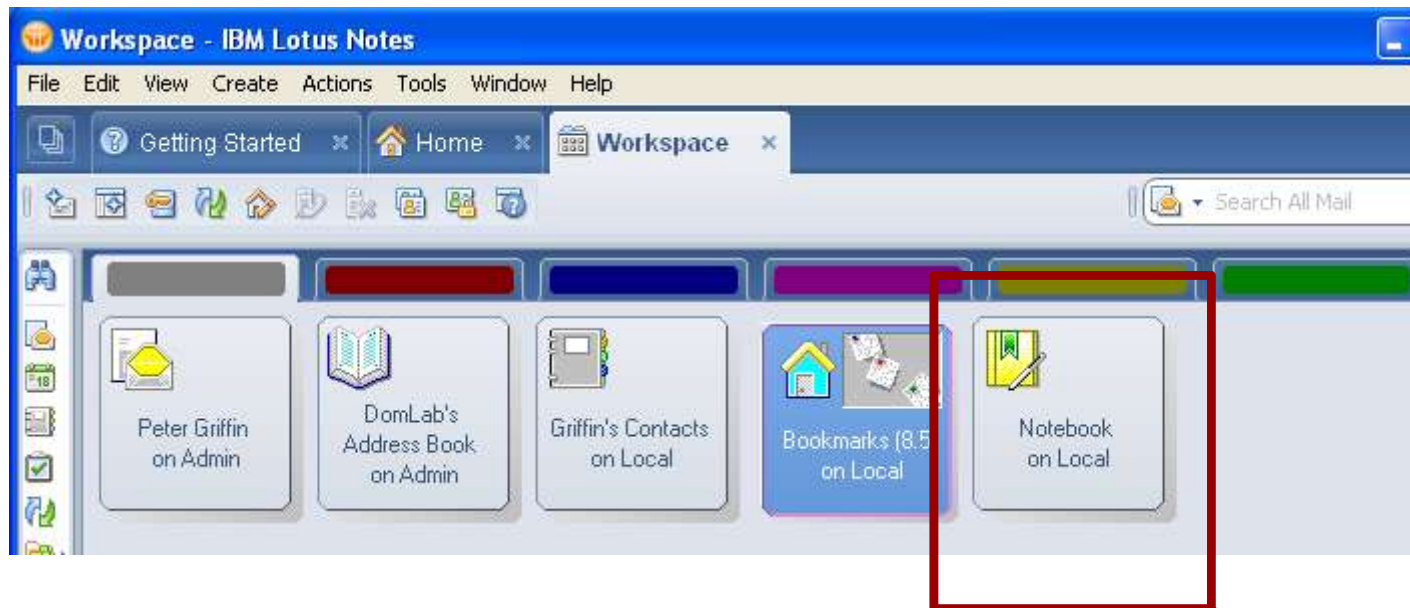
- When the new notebook is added, it helps the user by creating the first notebook entry
 - Is this annoying or helpful?
 - You decide for yourself!



The screenshot shows the Lotus Symphony Notebook application interface. The title bar indicates the active window is 'New Notebook Entry 12/14/2009'. The menu bar includes 'Open', 'Getting Started', 'Home', and the active window. The toolbar contains icons for various functions like cut, copy, paste, and save. Below the toolbar, there are buttons for 'Save and Close', 'Display', and 'Print Without Header'. The main content area is titled 'Notebook Entry' and features a 'Notebook Entry' icon. Below the icon, there is a text box for 'Entry Date' with a dropdown menu showing 'Today' and a small calendar icon. Further down, there is a 'Subject' field with the text 'My very first Notebook entry' and a 'Category' field with a dropdown menu showing 'LS10'.

The notebook is added to the desktop

- This notebook was added to the desktop using the home page button
 - Therefore it will be included with the other roaming files

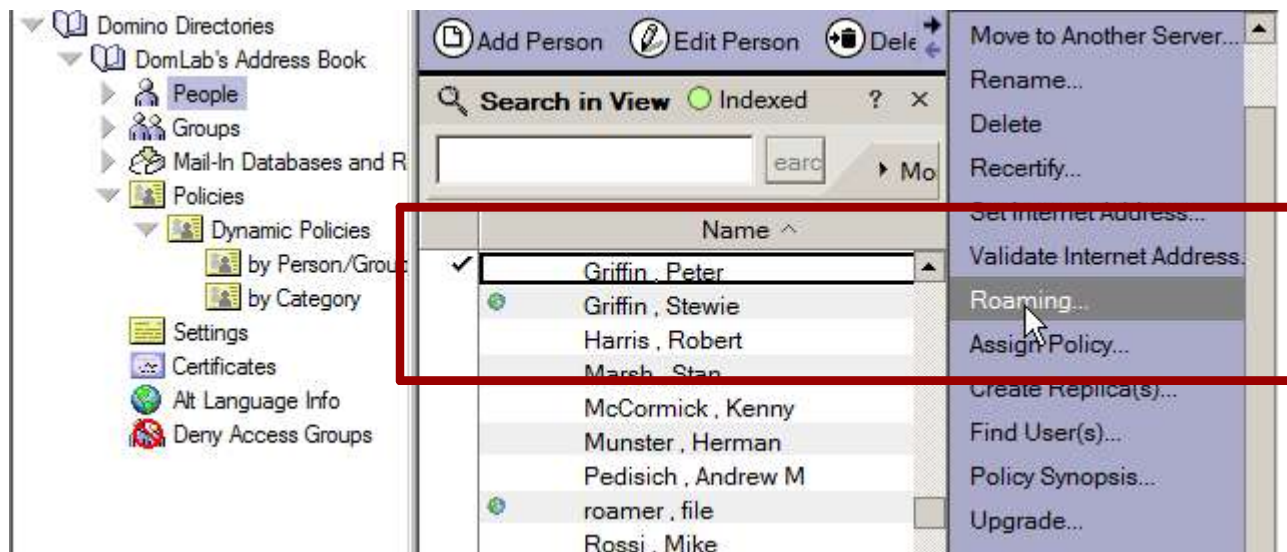


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Upgrade the user with the Domino Administrator client

- The Domino Administrator Client has the Roaming tool in the sidebar
 - Select the user or users to be upgraded
 - Click Roaming



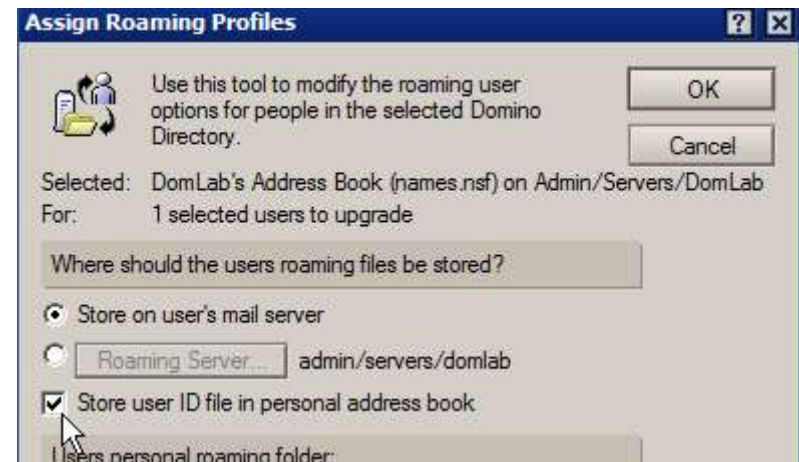
Options during the upgrade

- Very similar to creating a roaming user
 - Some additional options need to be covered

The screenshot shows the 'Assign Roaming Profiles' dialog box. It has a title bar with a question mark and a close button. The main text says: 'Use this tool to modify the roaming user options for people in the selected Domino Directory.' There are 'OK' and 'Cancel' buttons in the top right. Below this, it says: 'Selected: DomLab's Address Book (names.nsf) on Admin/Servers/DomLab' and 'For: 1 selected users to upgrade'. A section titled 'Where should the users roaming files be stored?' contains three options: 'Store on user's mail server' (selected with a radio button), 'Roaming Server...' (with a text box containing 'admin/servers/domlab'), and 'Store user ID file in personal address book' (checked with a checkbox). Below this is a section titled 'Users personal roaming folder:' with 'Base folder:' set to 'roaming\' and 'Sub-folder format:' set to 'ShortName' (from a dropdown menu). An 'Example:' shows '..\roaming\jsmith1\...'. The 'If folder exists:' section has 'Skip person' (radio button) and 'Generate folder name' (radio button, selected). Below is a 'Client upgrade option:' section with 'User should be prompted' (checked checkbox). The 'Client clean-up option:' section has a dropdown menu set to 'Do not clean-up' and a checkbox for 'Perform updates in background' which is unchecked.

Location for roaming files, and the ID

- Choose the location for roaming files
 - On mail server
 - On roaming server
- Make sure you click the box to store user ID in personal address book
 - Otherwise the user will be prompted for an ID location



Other roaming options

- Base folder, sub-folder and cleanup options have already been covered in this session
- Should the user be prompted before they roam?
 - In most cases, they should be asked whether or not they want a workstation to be included when they roam

The screenshot shows a configuration window titled "Users personal roaming folder:". It contains the following fields and options:

- Base folder:** A text box containing "roaming\".
- Sub-folder format:** A dropdown menu showing "ShortName".
- Example:** A text box showing "...\\roaming\\jsmith1\\...".
- If folder exists:** Two radio buttons: "Skip person" (unselected) and "Generate folder name" (selected).
- Client upgrade option:** A section containing a checked checkbox labeled "User should be prompted".
- Client clean-up option:** A dropdown menu showing "Do not clean-up".
- Perform updates in background:** An unchecked checkbox at the bottom right.

Asking the user if they want to roam

- Remember that roaming isn't just for people at kiosks and multi-user machines
 - Some people might have a separate workstation that has the Admin and Designer client
 - Or they switch IDs
 - These folks do not want to be roaming users because it is not supported
 - And switching IDs might cause them to be downgraded to a normal user
- Examine this option carefully to see how it fits into your organization

Finishing up the upgrade

- When the dialogue is complete, administration requests are submitted to the AdminP task




Agenda (cont'd)

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Adminp task makes changes


- A request is made to the Adminp task to update the user's person document to indicate the change to roaming user

ADMINISTRATION PROCESS - Log	
Action:	Update Roaming User State in Person Record
Link to request:	
Name(s) acted upon:	Peter Griffin/DomLab
Action requested by:	Andrew M Pedisich/DomLab
Server responding to request:	Admin/Servers/DomLab
Start time:	08:44:40 PM Today
End time:	08:44:40 PM Today
Databases processed:	Title: DomLab's Address Book Path: names.nsf
Perform request again?:	<input type="checkbox"/> Yes

Person documents are modified

- The roaming user state in the person document is updated

Administration Requests		Help		
		Sched. Type	Action	Requester
<ul style="list-style-type: none"> Administrative Attention Required Pending Administrator Approval <ul style="list-style-type: none"> Individual Approval Required Pending by Age Pending by Server All Activity by Server Errors 		12/14/2009		
		12/14/2009 08:43:56 PM		
			Update Roaming User State in Person Record	Andrew M
			Admin/Servers/DomLab performed action on: 12/14 08:44 PM	

ADMINISTRATION PROCESS - Log	
Action:	Update Roaming User State in Person Record
Link to request:	
Name(s) acted upon:	Peter Griffin/DomLab
Action requested by:	Andrew M Pedisich/DomLab
Server responding to request:	Admin/Servers/DomLab
Start time:	08:44:40 PM Today
End time:	08:44:40 PM Today
Databases processed:	Title: DomLab's Address Book Path: names.nsf
Perform request again?:	<input type="checkbox"/> Yes

The person view changes

- A change is made to the person documents view
 - Upgraded users who have not yet completed the initial roaming setup have a new icon
 - An hourglass
 - Completed roaming users have globe icons

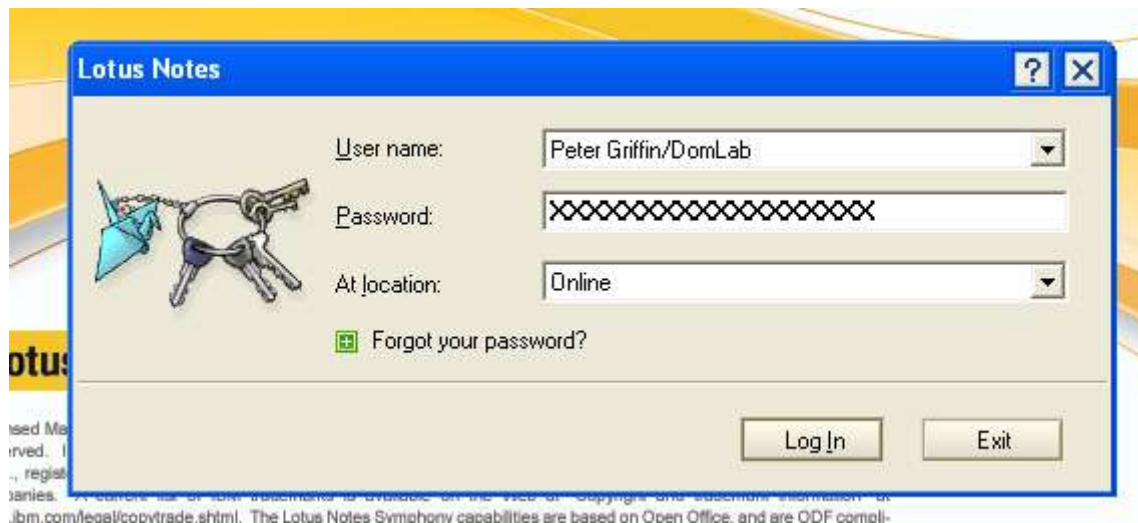


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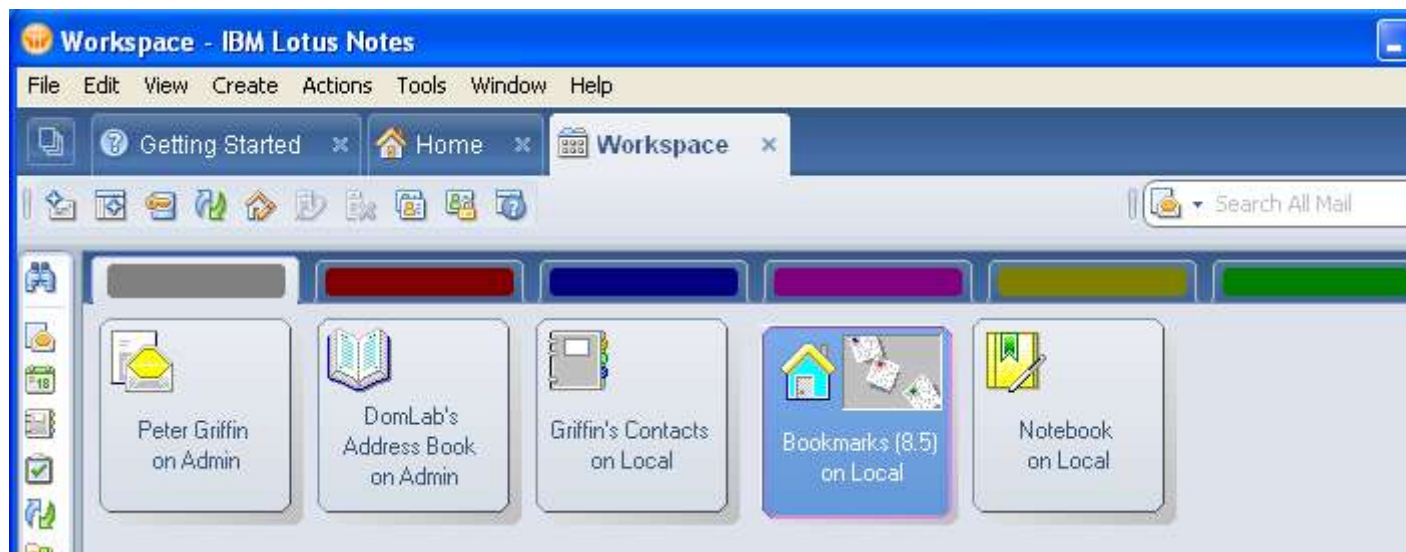
Upgrade roaming user logs on

- The user has already been through setup on the multi-user Notes client
 - This is a normal login with no setup needed



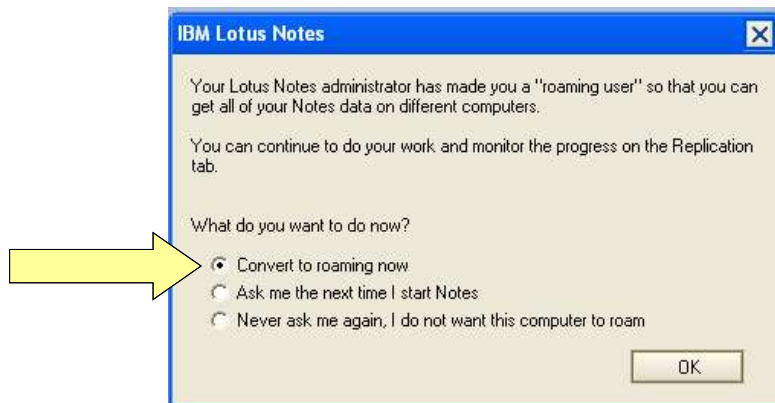
Arrives at desktop

- The roaming user still has the normal desktop
 - When the user connects to their mail server it starts the upgrade process



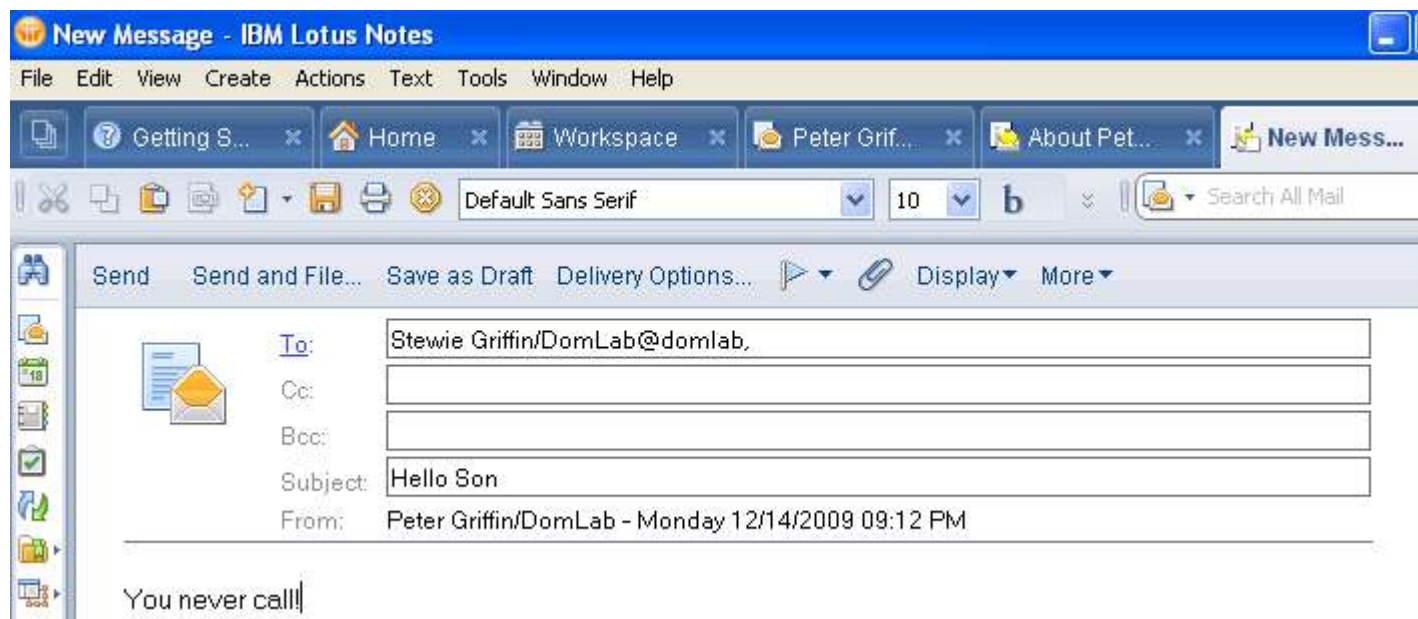
Prompts for the upgrade

- The user is prompted for the upgrade
 - Convert to roaming now is appropriate for this user
 - The user could ask to be asked again about it
 - Or the user could decide never to roam on this system
- The user is notified when upgrade completes
 - Be patient – it takes several minutes to finish



Waiting for completion

- While he's waiting, Peter kicks off a quick message to Stewie

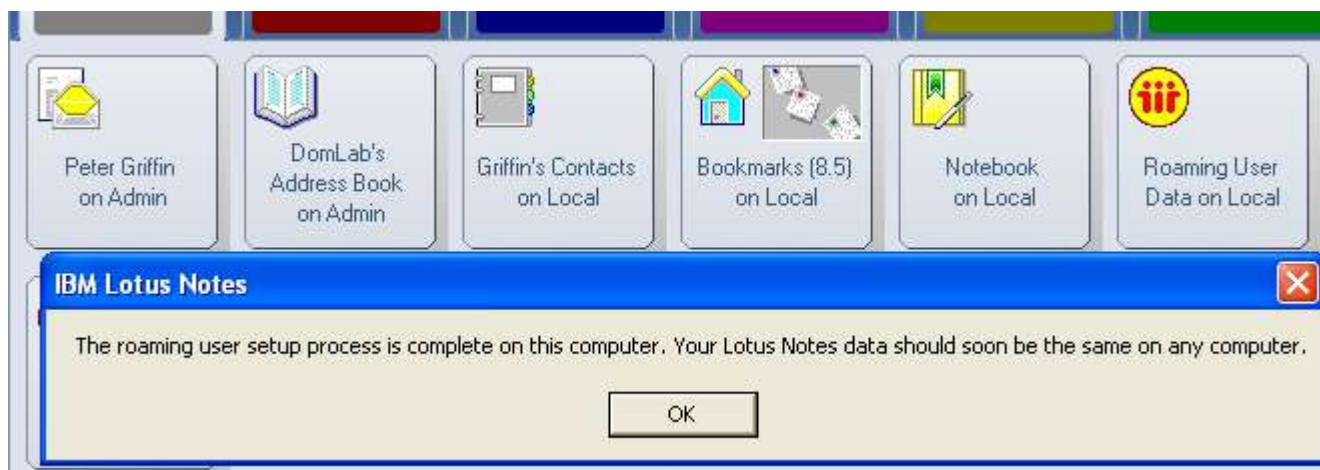


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The end of the upgrade

- After a few minutes, the upgrade is complete and the completion message is displayed



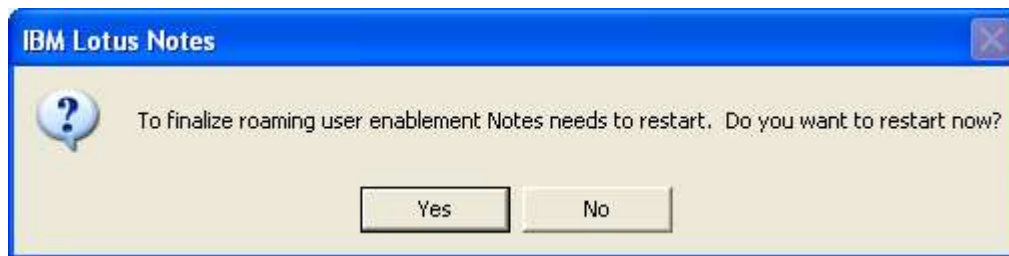
AdminP had a big role in the upgrade

- A series of Adminp requests were made
 - Replica stubs were made from the databases on the users desktop
 - Creation of these stubs were made by the adminp task
 - The user does not require “create replica” rights to make these replicas

	Sched. Type	Action	Requester	Action performed on
▼	12/14/2009			
▼	12/14/2009 09:09:44 PM			
		Update Client Information in Person Record	Peter Griffin/DomLab	Peter Griffin/DomLab
		Admin/Servers/DomLab performed action on: 12/14 09:10 PM		
▼	12/14/2009 09:07:04 PM			
		Update Roaming User State in Person Record	Andrew M Pedisich/Doml	Peter Griffin/DomLab
		Admin/Servers/DomLab performed action on: 12/14 09:07 PM		
▼	12/14/2009 09:07:04 PM			
		Create Roaming User's Replica Stubs	Andrew M Pedisich/Doml	Peter Griffin/DomLab
		Admin/Servers/DomLab performed action on: 12/14 09:12 PM		
		Update Roaming User Information in Person Record	Andrew M Pedisich/Doml	Peter Griffin/DomLab
		Admin/Servers/DomLab performed action on: 12/14 09:13 PM		
		Monitor Roaming User's Replica Stubs	Andrew M Pedisich/Doml	Peter Griffin/DomLab
		Admin/Servers/DomLab performed action on: 12/14 09:18 PM		
		Update Roaming User State in Person Record	Andrew M Pedisich/Doml	Peter Griffin/DomLab
		Admin/Servers/DomLab performed action on: 12/14 09:18 PM		

A restart is needed

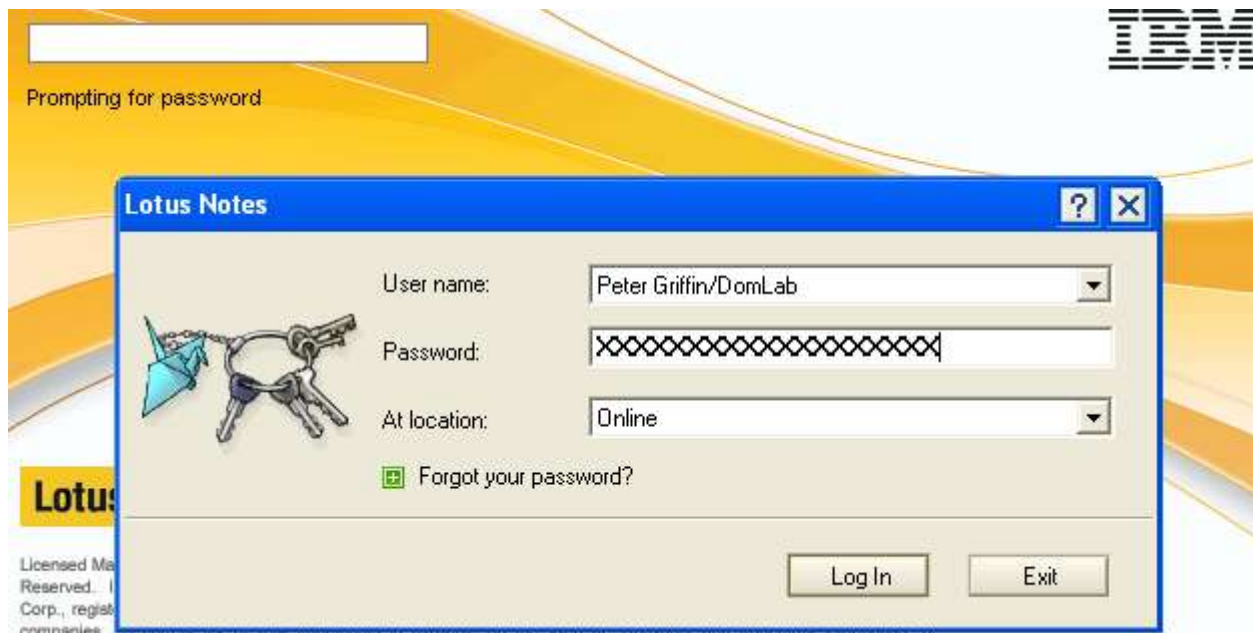
- After the upgrade, the user is prompted to restart
 - Users who are upgraded should be reminded to let all processes finish and to wait for completion messages
 - Yes, a little education is required



Agenda (cont'd)

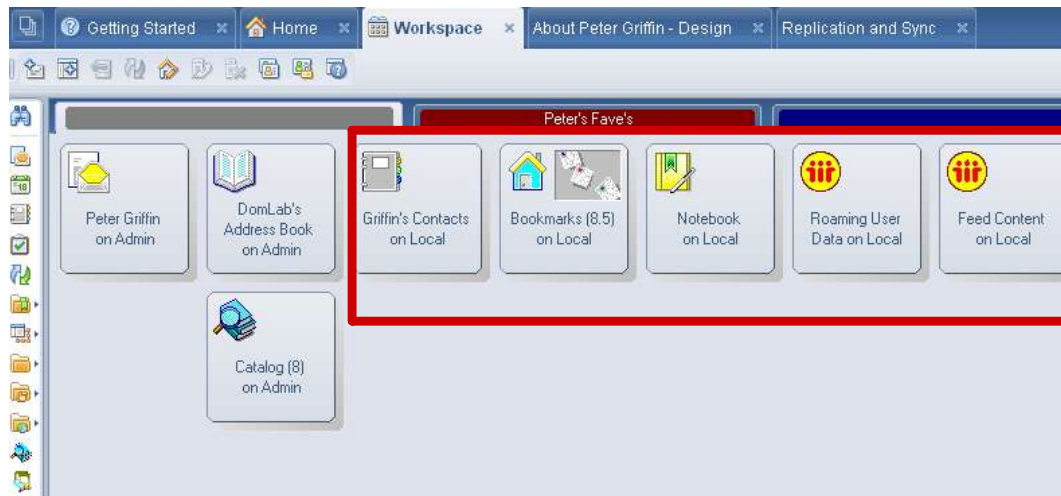
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 - Downgrading a roaming user

Upgraded user logs in



The new desktop after the upgrade

- Slightly different than the registered as roaming
 - Note that all roaming replicas are local
 - There are no stacked icons for server copies
 - The replicas are on the server, but they are not stacked as they are for someone who was created as a roaming user



Replication page changes

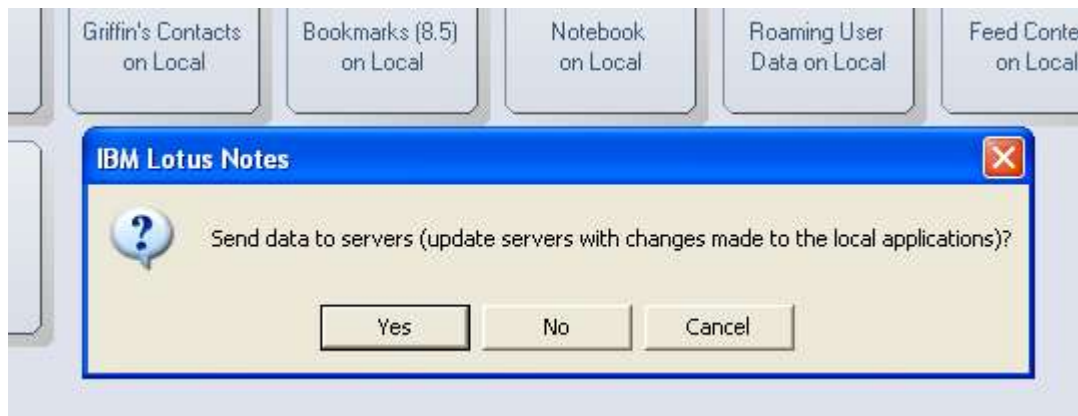
- Replication has been enabled
 - Roaming replication settings have been set
 - Any existing replication settings have been overwritten

Replication and Sync ▾ Start Now ▾ Schedule ▾ Application-Specific Options... Preferences...

Enabled	High Priority	Application ^	Last Run ▾	Scope	Summary ▾
<input type="checkbox"/>		Synchronize Contacts			Disabled
<input type="checkbox"/>		Application templates (NTFs)			
<input checked="" type="checkbox"/>		Synchronize Activities			Next operation started at your request
<input checked="" type="checkbox"/>		Roaming User Applications			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Griffin's Contacts	01:22 PM Today		0 Received, 2 Sent with Admin/Servers/DomLab
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Bookmarks (8.5)	01:22 PM Today		0 Received, 8 Sent with Admin/Servers/DomLab
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Notebook	01:22 PM Today		0 Received, 0 Sent with Admin/Servers/DomLab
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Roaming User Data	01:22 PM Today		0 Received, 0 Sent with Admin/Servers/DomLab
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Feed Content	01:22 PM Today		0 Received, 0 Sent with Admin/Servers/DomLab

Leaving the workstation

- When the user logs out, they are prompted to replicate
 - Again, this is an important part of being a roaming user
 - If the user chooses “No”, personal data will not be properly synchronized

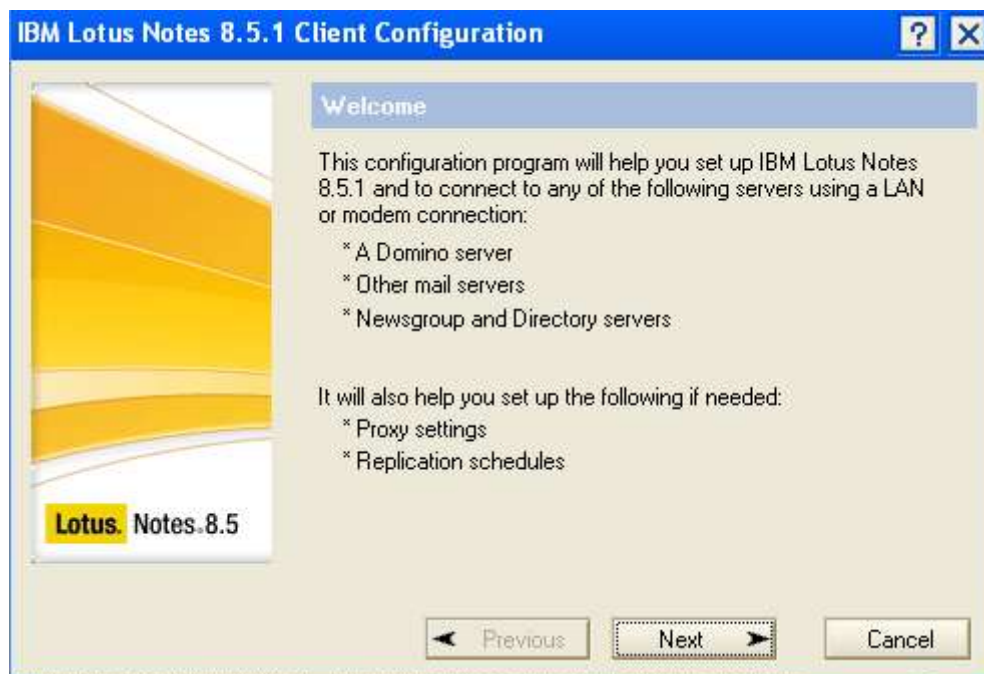


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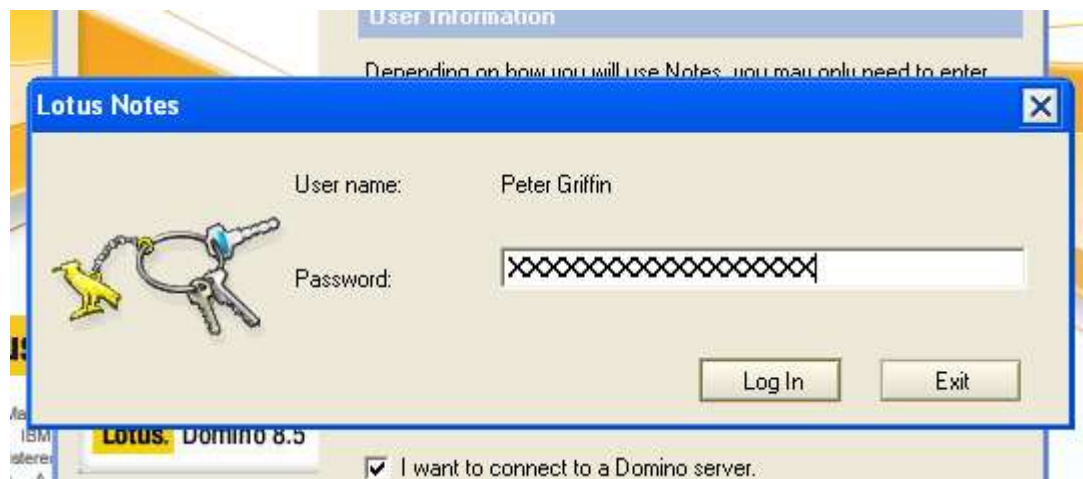
Upgraded user connects

- The upgraded user goes through setup on workstation #2



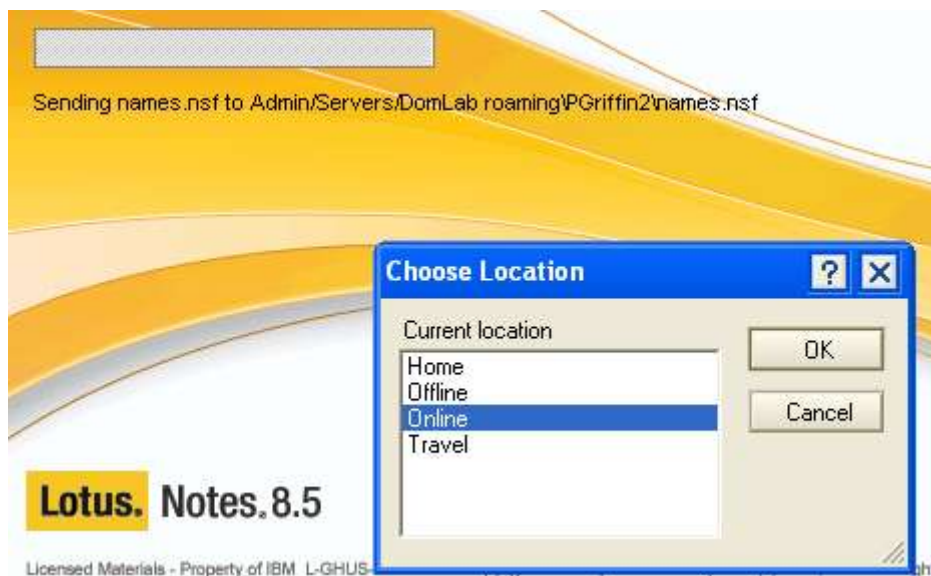
Authentication

- The user authenticates normally



Similar to the user created as roaming

- User selects location because the address book now exists on the server



Desktop Roaming

- The desktop roaming for the upgrade user is the same as for the user created as roaming
 - Except that there are no server based icons
 - Those databases do have replicas on the server however



Everything works the same

- This upgraded roaming user has the same issue as the user created as a roaming user
 - The local database that was created does not roam
 - Not really an issue, just something to communicate
- Other than that the functionality is identical with the user created as roaming



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 - **Downgrading a roaming user**

Downgrading roaming does not effect user's social status

- IBM/Lotus refers the removal of the roaming user configuration as a “downgrade”
 - It removes the user's ability to roam by changing the “User can roam” specification in the user's person document
 - **We'll examine** other drastic changes too

Person: Nick Danger/DomLab NickDanger@domlab

Basics | Work/Home | Other | Miscellaneous | Certificates | Roaming | Administration

Roaming

User can roam: Yes

Roaming server: admin/servers/domlab

Roaming replica servers:

User subfolder: roaming\NickDanger

Personal address book: names.nsf

Bookmarks filename: bookmark.nsf

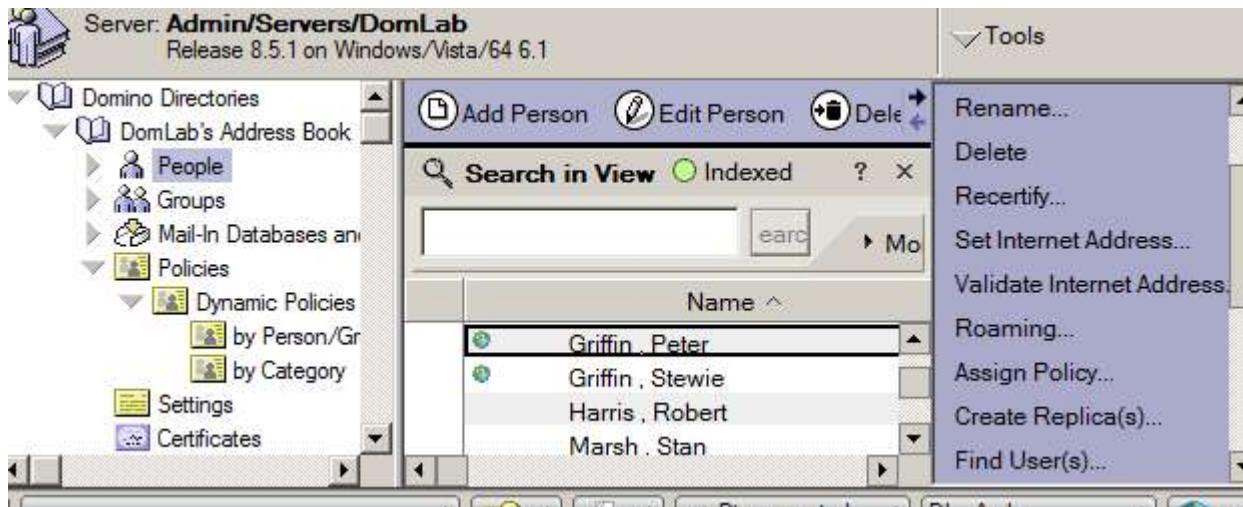
Journal filename: notebook.nsf

Roaming databases: localfeedcontent.nsf, roamingdata.nsf

Clean-up setting: Do not clean-up

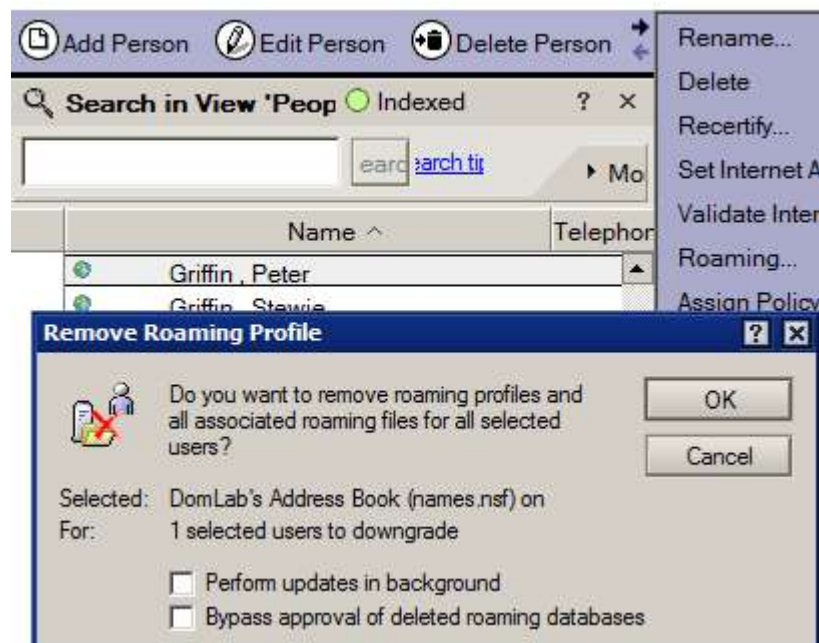
Start the downgrade in IBM Domino Administrator client

- Go to “people” view in IBM Domino administrator client
 - The list of user management tools will appear on the right side
- Select the user or users in the people view of the Notes Administrator client



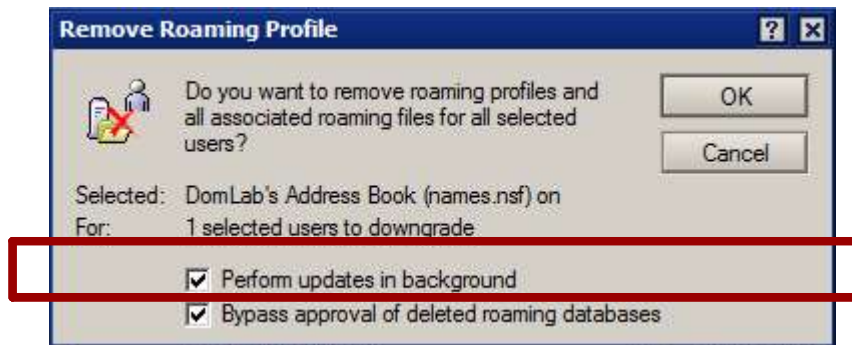
Click Roaming...

- Click Roaming to produce the roaming dialogue box



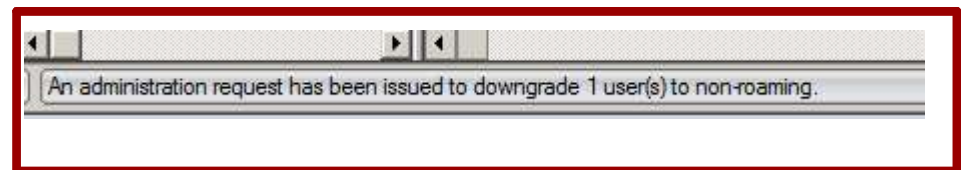
Examining the options

- Select perform updates in the background to submit requests to the Adminp task to take care of all the details
 - This is ideal if there are more than one or two users being downgraded
 - If you don't check the box, you'll have to wait for the tasks to complete before you can use Notes again



Bypassing approval for deletions

- Click on the “Bypass approval” box if you are absolutely certain you are OK with deleting the user's roaming files from the server
 - The will be deleted immediately
 - If you don't check the box you will have to approve of the deletion of the files as you do when you delete a user's mail file
- Either way a message will display showing the process is underway



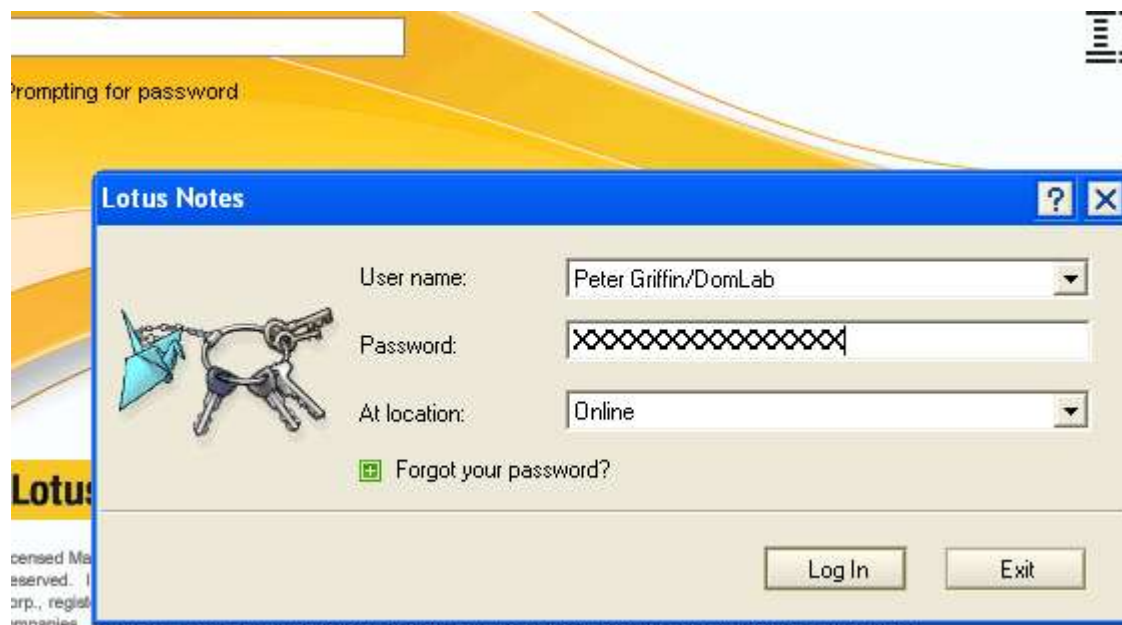
Adminp task requests

- Adminp tasks requests are sent to:
 - Update the roaming user fields in the person doc
 - Remove the roaming user files from Domino
 - Get replica information for deletion
 - Request replica deletion
 - And delete the replica if you've chosen to in the previous step



User logs in after downgrade

- The next time a user logs in it appears nothing has changed



Message about downgrade

- As soon as the user opens their mail file an ominous, somewhat confusing message appears
 - Technically, the message is exactly correct
 - But your user probably won't fully understand it
 - Be prepared to receive Help Desk Calls
 - Or be pro-active and tell the user ahead of time to expect this message
 - It is not configurable – you cannot change the message when a user is upgraded using the Notes Administrator client
 - There is no way to avoid sending the user the text in this message



Agenda (cont'd)

- **Roaming on a file share**
 - **Some facts about file share roaming**
 - Adding a share for the roaming user's files
 - Creating a policy settings document for the file share roamer
 - Creating a policy document for the files share roamer
 - Roaming user re-connects to workstation #1
 - Roaming user connects to workstation #2 for the first time

File server roaming is newish

- File server roaming is new in Release 8.5
 - Keeps roaming user files on a standard file server
- Designed for clients who don't have a Domino server nearby but still want to roam between multiple workstations
 - Think about a remote office location that uses local mail file replicas
 - Their Domino server could be located over a very slow wide area network that would suffer with roaming user traffic demands

Features of file server

- Databases are encrypted by default
 - Failover is supported via OS clustering only
- For the user, there is very little difference in the core roaming experience between Domino roaming and file server roaming
 - The same five files will roam

How to control file server roaming

- User file server roaming is controlled via policies
 - You cannot configure users during registration using the Notes administrator client
 - You cannot upgrade or downgrade existing users using the Notes administrator client
 - The process must be controlled solely using policies
- It is super important that all user computers can access the file server when they login to the network
 - And that they use the correct credentials or going through a firewall
 - Otherwise roaming on a file server will not work

File server roaming

- Here are the steps to get a users roaming on files servers
 - Create a share on a file server that is accessible to all users when they log into the network
 - Or make the share available to everyone, perhaps even guests
 - Make a roaming user policy settings document
 - Apply the policy to the user either
 - Through an explicit policy to a user or user(s)
 - Through an organizational policy to a particular organizational level in your certifier hierarchy

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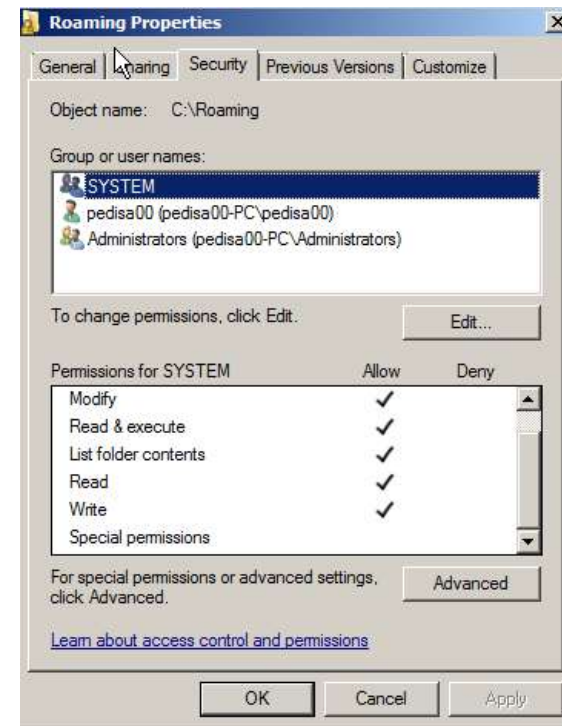
Adding a share

- This varies a little by operating system, but in Windows it generally looks like this
 - Select the folder you want to share and right click it to bring up the properties of the folder



Changing security on the share

- You might find it necessary to change the security on the share
 - Contact your network support team to arrange for this share to be created and managed



Agenda (cont'd)

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Creating a policy for file share roamers

- There are two steps to make the policy for the roaming users
 - Start by making a policy settings document for roamers
 - Then create a policy document that will be used to assign the policy to users in the domain

Creating the policy settings document

- Open the directory
- Go to Policies/Settings
- Choose Roaming



Roaming user policy settings

- We'll take this document a section at a time

File Server Roaming Options	
Server name:	<input type="text" value="M:\"/>
Base folder:	<input type="text" value="roaming\"/>
Sub-folder format:	<input type="text" value="Shortname"/>
Example:	..\roaming\tamado\...
Files that roam:	bookmark.nsf, roamingdata.nsf, notebook.nsf, names.nsf, localfeedcontent.nsf
Show roaming setup dialogs:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/>
Modifiable text for the first dialog:	<input all="" can="" get="" notes<br="" of="" roaming="" so="" that="" type="text" user"="" value="Your Lotus Notes administrator has made you a
" you="" your=""/> data on different computers. You can continue to do your work and monitor the progress on the Replication tab."/>
Text for the "Roaming complete" dialog:	<input type="text" value="The roaming user setup process is complete on
this computer. Your Lotus Notes data will be the
same on any computer."/>
Data removal on local drives:	<input type="text" value="Do not remove data"/>
Allow user to temporarily disable roaming:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/>

Roaming user policy settings

- The server name field can hold either the entire name of the file server and share
 - For example: \\server01\roaming
- Or, if a logon script maps to the share, it can contain the drive letter used
 - For example: M:\

File Server
Roaming Options

Server name:	M:\
Base folder:	roaming
Sub-folder format:	Shortname
Example:	..\roaming\tamado\...
Files that roam:	bookmark.nsf, roamingdata.nsf, notebook.nsf, names.nsf, localfeedcontent.nsf
Show roaming setup	<input checked="" type="checkbox"/> Yes

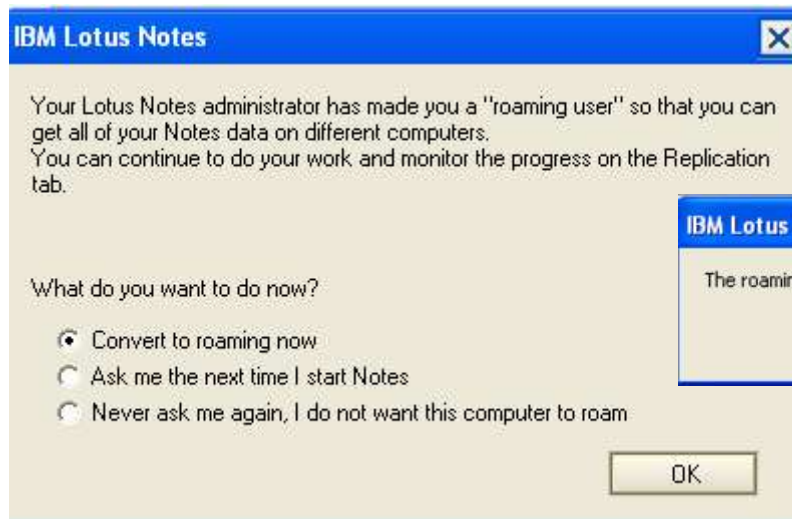
Roaming user policy settings (cont'd)

- We've covered the base folder and sub-folder format earlier in the session
- You cannot edit the “files that roam” field

File Server Roaming Options	
Server name:	M:\
Base folder:	roaming\
Sub-folder format:	Shortname
Example:	roaming\amado\
Files that roam:	bookmark.nsf, roamingdata.nsf, notebook.nsf, names.nsf, localfeedcontent.nsf
Show roaming setup dialogs:	Yes
Modifiable text for the first dialog:	Your Lotus Notes administrator has made you a "roaming user" so that you can get all of your Notes data on different computers. You can continue to do your work and monitor the progress on the Replication tab.
Text for the "Roaming complete" dialog:	The roaming user setup process is complete on this computer. Your Lotus Notes data will be the same on any computer.
Data removal on local drives:	Do not remove data
Allow user to temporarily disable roaming:	Yes

New options for file server roaming

- Administrators can select whether or not the user will see roaming setup dialogues
 - And they can control the content of the messages
 - These choices are not available when configuring a roaming user on a Domino server



Roaming user policy settings (cont'd)

- Set “Show roaming dialogue” to “Yes” so that the user is prompted when upgraded to roaming
 - Then you can customize the message the user gets at the beginning and end of the upgrade

File Server Roaming Options	
Server name:	M:\
Base folder:	roaming\
Sub-folder format:	Shortname
Example:	..roaming\tamado\...
Files that roam:	bookmark.nsf, roamingdata.nsf, notebook.nsf, ...
Show roaming setup dialogs:	Yes
Modifiable text for the first dialog:	Your Lotus Notes administrator has made you a "roaming user" so that you can get all of your Notes data on different computers. You can continue to do your work and monitor the progress on the Replication tab.
Text for the "Roaming complete" dialog:	The roaming user setup process is complete on this computer. Your Lotus Notes data will be the same on any computer.
Data removal on local drives:	Do not remove data
Allow user to temporarily disable roaming:	Yes

Roaming user policy settings (cont'd)

- The “Data removal on local drives” option is the same as the clean up option we covered earlier in this session

File Server Roaming Options	
Server name:	M:\
Base folder:	roaming\
Sub-folder format:	Shortname
Example:	..\roaming\tamado\...
Files that roam:	bookmark.nsf, roamingdata.nsf, notebook.nsf, names.nsf, localfeedcontent.nsf
Show roaming setup dialogs:	Yes
Modifiable text for the first dialog:	Your Lotus Notes administrator has made you a "roaming user" so that you can get all of your Notes data on different computers. You can continue to do your work and monitor the progress on the Replication tab.
Text for the "Roaming complete" dialog:	The roaming user setup process is complete on this computer. Your Lotus Notes data will be the same on any computer.
Data removal on local drives:	Do not remove data
Allow user to temporarily disable roaming:	Yes

Roaming user policy settings (cont'd)

- The last setting lets the user disable roaming
 - Set this to "No" unless you have determined a good reason why users should be permitted to turn off roaming on certain workstations

File Server Roaming Options	
Server name:	M:\
Base folder:	roaming\
Sub-folder format:	Shortname
Example:	..roaming\itamado\...
Files that roam:	bookmark.nsf, roamingdata.nsf, notebook.nsf, names.nsf, localfeedcontent.nsf
Show roaming setup dialogs:	Yes
Modifiable text for the first dialog:	Your Lotus Notes administrator has made you a "roaming user" so that you can get all of your Notes data on different computers. You can continue to do your work and monitor the progress on the Replication tab.
Text for the "Roaming complete" dialog:	The roaming user setup process is complete on this computer. Your Lotus Notes data will be the same on any computer.
Data removal on local	Do not remove data
Allow user to temporarily disable roaming:	Yes

Agenda (cont'd)

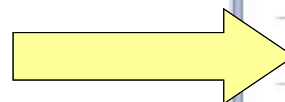
- **Roaming on a file share**
 - Some facts about file share roaming
 - Adding a share for the roaming user's files
 - Creating a policy settings document for the file share roamer
 - **Creating a policy document for the files share roamer**
 - Roaming user reconnects to workstation #1
 - Roaming user connects to workstation #2 for the first time

Moving on to the policy doc

- Create an organizational policy document to assign the Roaming policy settings document to all users at the organization level
- Or choose an OU1 level such as
 - */accounting/domlab

Basics	
Policy name:	*/domlab
Policy type:	Organizational
Description:	
Category:	

Setting Type	Setting Name
Registration:	
Setup:	
Archiving:	
Desktop:	
Security:	
Mail:	
Connections:	
Lotus Traveler:	
Roaming:	Roaming Settings
Symphony:	



Creating an explicit policy

- Use an explicit policy document to assign the Roaming policy settings document to individual users
 - There are also dynamic policies that can be used to assign the policy to a group

Basics

Policy name: /Roaming Policy

Policy type: Explicit

Description:

Category:

Setting Type

Setting Name

Registration:

Setup:

Archiving:

Desktop:

Security:

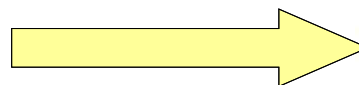
Mail:

Connections:

Lotus Traveler:

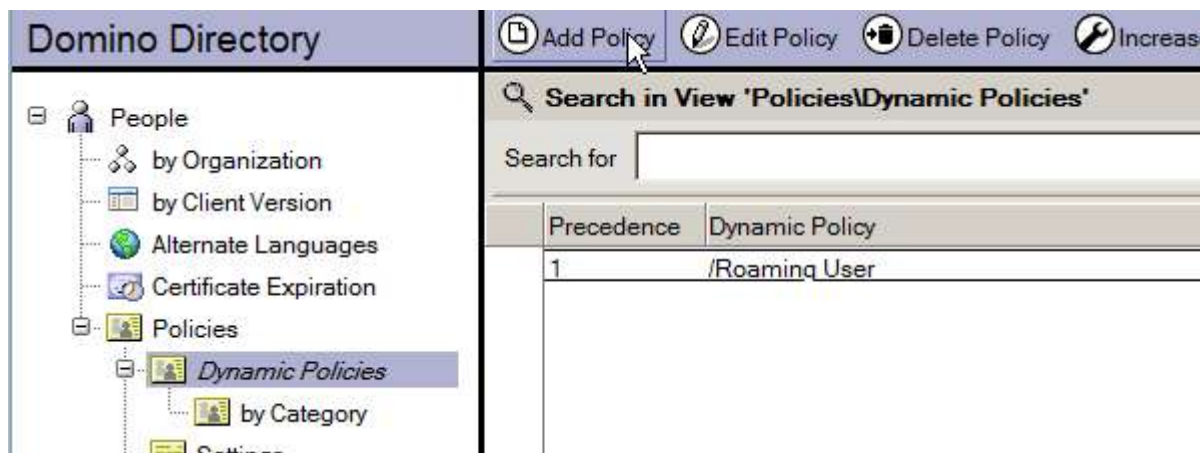
Roaming: Roaming Settings

Symphony:



Dynamic policies

- You can apply the policy to a group using dynamic policies
- Click on Add Policy



Assign the policy settings document

- Add the roaming policy settings document
- Then move to the policy assignment tab

Policy : /Roaming User

Basics | Policy Assignment | Policy Precedence | Comments | Admin

Policy name: /Roaming User

Policy type: Explicit

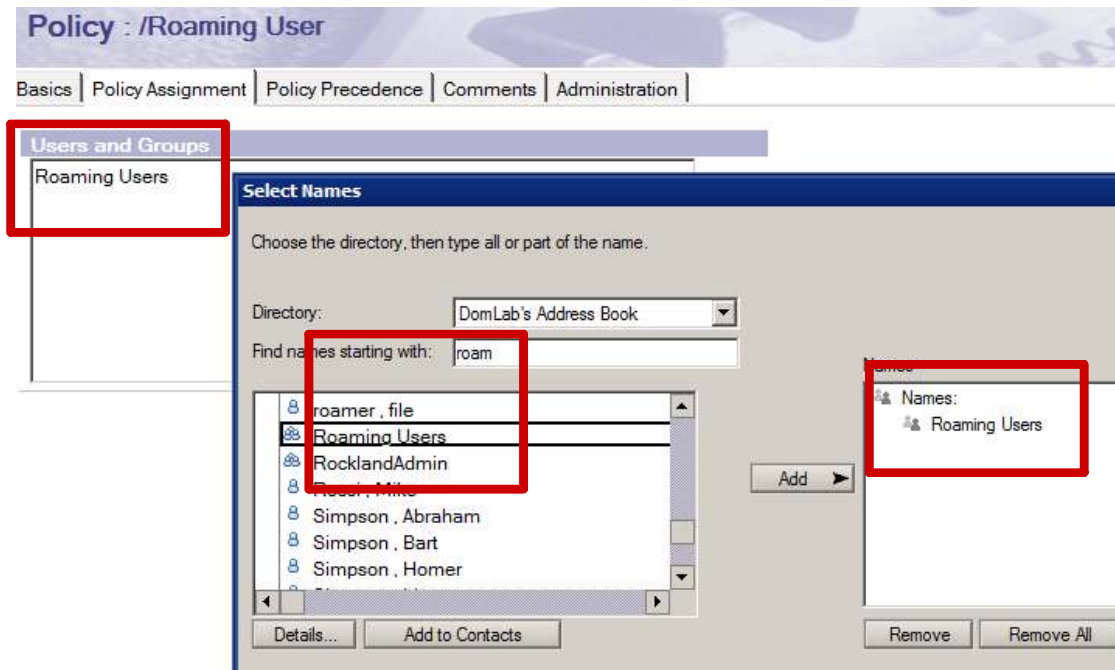
Description:

Category:

Setting Type	Setting Name
Registration:	
Setup:	
Archiving:	
Desktop:	
Security:	
Mail:	
Connections:	
Lotus Traveler:	
Roaming:	Domlab Roaming User
Symphony:	

Add the group that contains your roaming users

- Everyone in the group gets the policy to be a roaming user
 - And if you add people to the group, they will dynamically get the policy to roam



Assigning explicit policies to users

- Assign the explicit policy to an individual in their person documents on the Administration tab
 - Select from a list of policies in your domain

Person: **Lois Griffin/DomLab** LoisGriffin@domlab.com

Basics | Work/Home | Other | Miscellaneous | Certificates | Roaming | Administration

Administration

Owners: Lois Griffin/DomLab

Administrators:

Allow foreign directory synchronization: Yes

Last updated: 12/16/2009 01:59

Password Management

Check password: Don't check password

Required change interval: 0

Grace period: 0

Select Keywords

Keywords

- /Allow change
- /Explicit 365 day archive
- /Just change security to password change
- /Prevent stuff
- /Roaming Policy**

OK

Cancel

Roaming Policy

Policy: /Roaming Policy

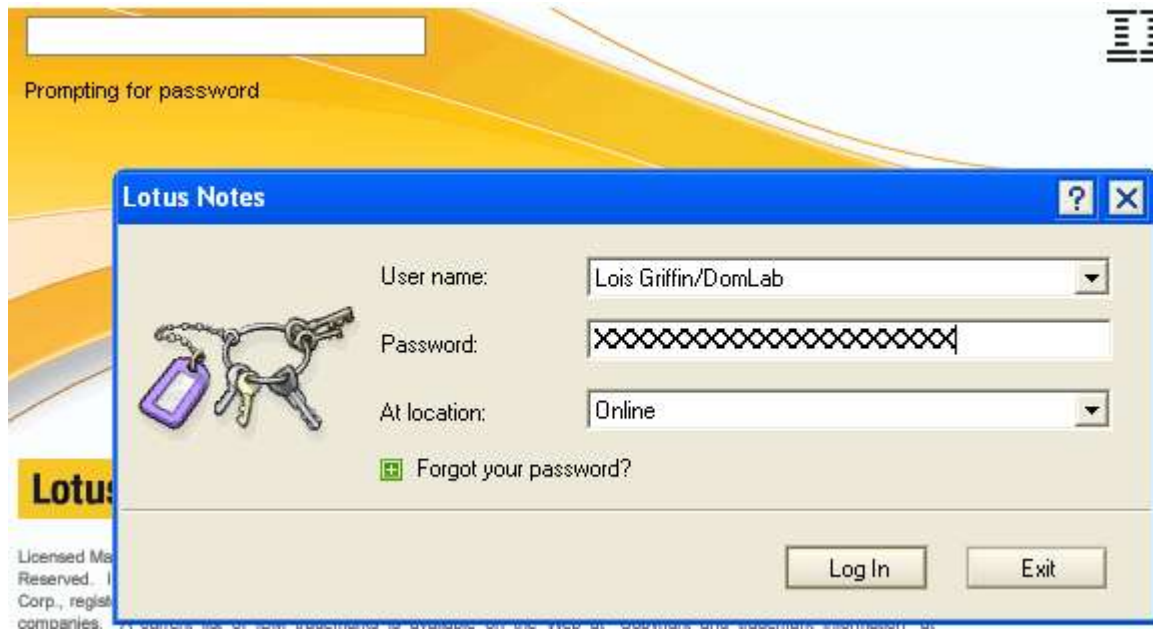
Assign(s):

Agenda (cont'd)

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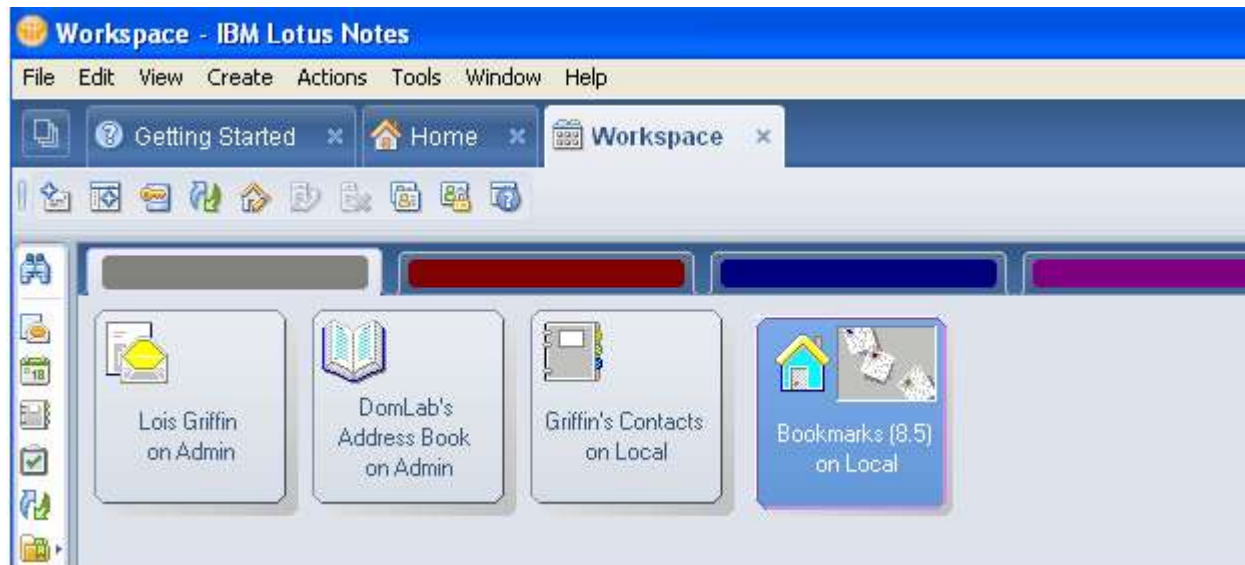
Use Experience

- The user logs in normally



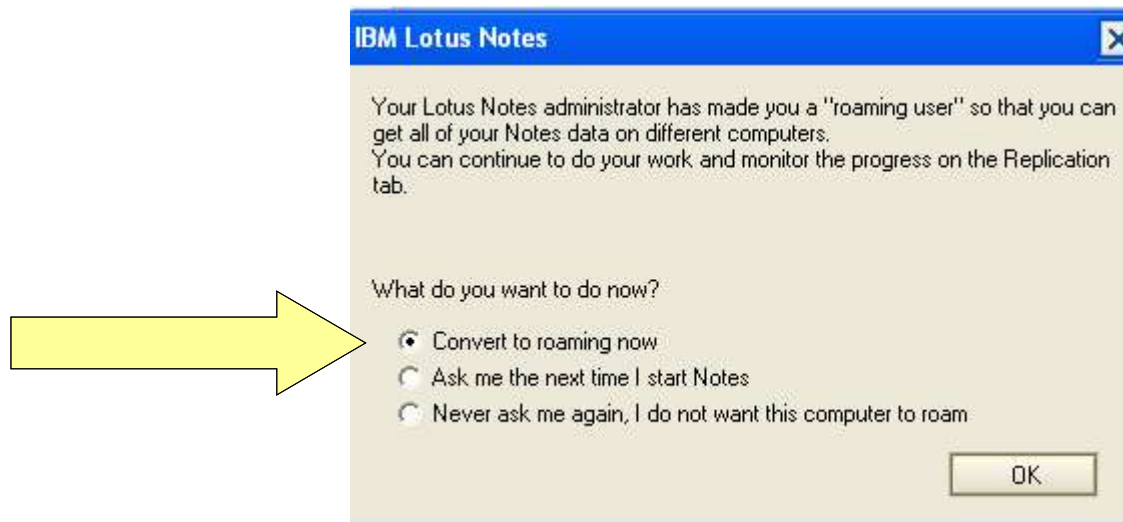
This normal user doesn't have a notebook

- If this user wants to have a notebook that roams, it should be created prior to upgrading
 - We've covered those steps earlier in this session
- User clicks on mail file and upgrade starts



User receives a message about upgrade

- When the user clicks on their mail file, they receive the message about the upgrade
 - The text in the message can be controlled in the roaming user policy



Replicator page changes

- The replicator page shows replication with the drive letter M: as specified in the policy
 - This screenshot was made while the upgrade was in progress
 - It shows some replicas with no documents sent yet

Replication and Sync Stop Schedule Application-Specific Options... Preferences... Options are for Online

Enabled	High Priority	Application ^	Last Run ^	Scope	Summary ^
<input type="checkbox"/>		Synchronize Contacts			Disabled
<input type="checkbox"/>		Application templates (NTFs)			
<input checked="" type="checkbox"/>		Synchronize Activities			
<input checked="" type="checkbox"/>		Roaming User Applications			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Griffin's Contacts	02:24 PM Today		0 Received, 68 Sent (Design: 0 Received, 269 Sent) with M:
		Bookmarks (8.5)	02:24 PM Today		0 Received, 37 Sent (Design: 0 Received, 640 Sent) with M:
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Notebook			with M:
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Roaming User Data			with M:
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Feed Content			with M:

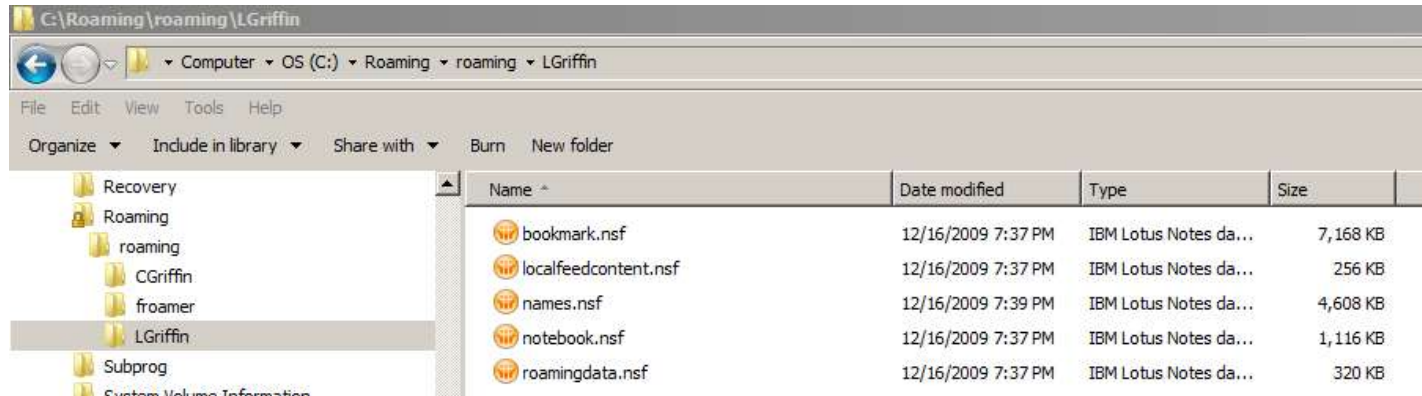
All required databases on desktop

- At the conclusion of the setup, all the databases are on the desktop
- It is similar to the upgraded user in that there are no server-based replicas on the desktop



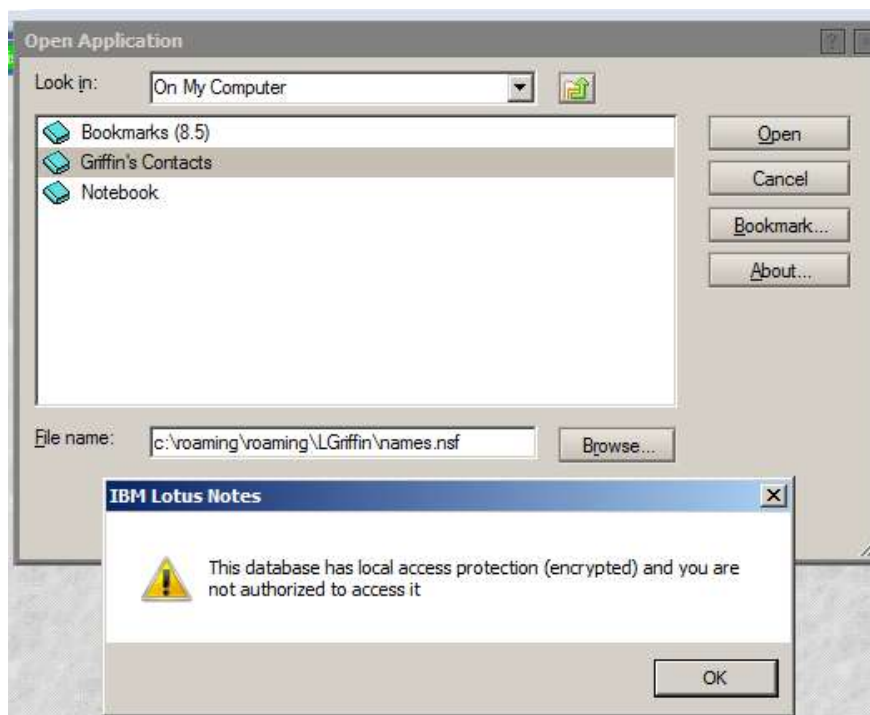
Files now on file share too

- All of the roaming user files that roam can be found on the share under the user's folders
 - Despite the fact that other users can navigate to this area, the files are protected



Files on share are encrypted

- All roaming user files on the share are encrypted using the public key of the user the files belong to



Roaming user adds desktop items

- This roaming user adds items to the desktop
 - The server based icons will roam
 - The icons for local databases will roam but will not function



User logs out and is prompted to replicate

- By now, you should understand that this is the standard logout procedure for a roaming user
 - The user must clearly understand the importance of replicating at the end of a session

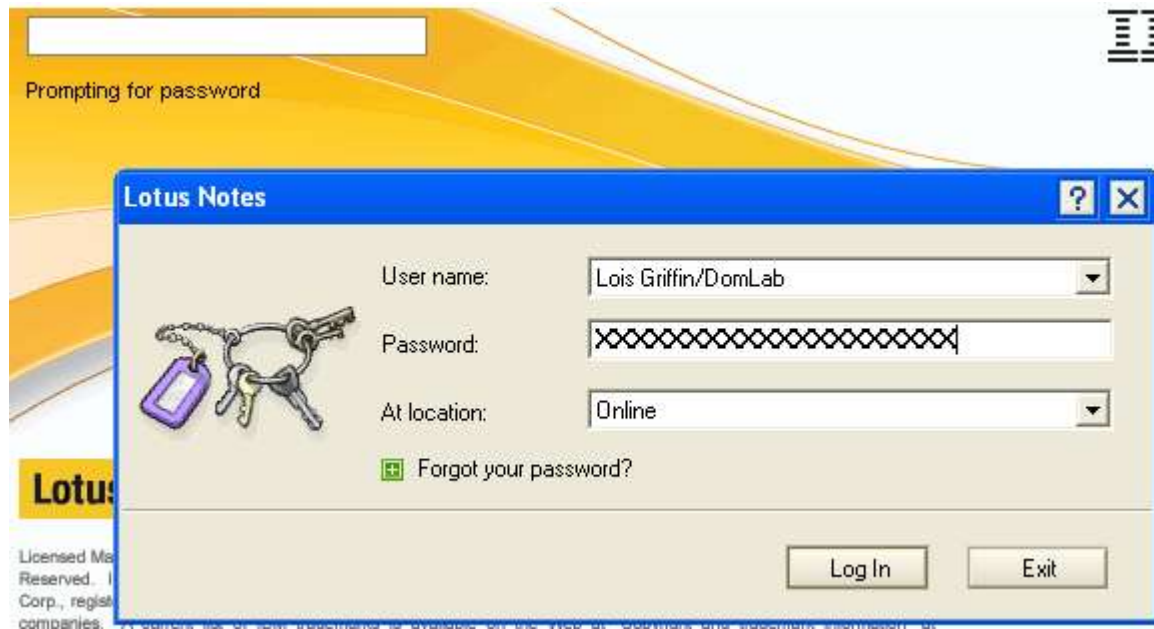


Agenda (cont'd)

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Another normal login

- No setup required because the user has already been set up





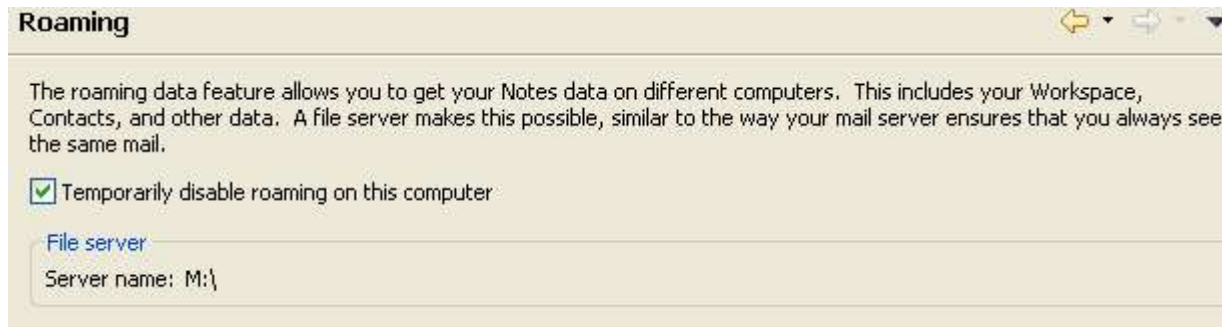
Slight issue

- There is an issue when the file server roaming user connects to workstation #2 using Release 8.5.1
 - There is a bug that is known and a fix is on the way
 - The client does not open the ID file from NAMES.NSF
 - The client asks the user for an ID file
- When this is fixed the user will have a normal roaming experience
 - Just like the users created as roaming users and the users upgraded to roaming users with the Notes administrator client



An additional file server roaming feature

- Roaming file server users have an additional configuration item in their preferences
 - They can temporarily disable replication on this particular system
 - As mentioned, you can turn this feature off in the roaming policy settings document



Agenda (cont'd)

- **Some additional facts about roaming users**
- Q & A

Some helpful Information

- Storing roaming user ID in Personal Address Book during user registration is now required
 - <http://www-01.ibm.com/support/docview.wss?uid=swg21331103>
- User upgrade to roaming user does not complete if personal roaming folder already exists
 - <http://www-01.ibm.com/support/docview.wss?uid=swg21328893>
- How to confirm that workspace roaming is enabled for a Notes 8.5.1 user
 - <http://www-01.ibm.com/support/docview.wss?uid=swg21405295>

Q & A

- Andy Pedisich
 - Andyp@technotics.com
 - <http://www.andypedisich.com>
- Rob Axelrod
 - Rob@technotics.com
- Technotics, Inc.
 - <http://www.technotics.com>



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