

THE VIEW

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Sophisticated client management: Go beyond policies with BCC_ClientGenie

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Go beyond policies with BCC_ClientGenie



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Administrators are always looking for a more efficient way to manage their IBM Lotus Notes environment. To this end, Notes introduced policy-based system administration to manage and apply corporate policies in release 6, which allowed administrators to enforce user settings in several areas: archiving, desktop, setup, registration, and security.

In release 8, Notes lets administrators control users' activities and productivity tools settings. Administrators can assign policies either organization-wide or in users' Person documents (policies do not support the use of Domino Directory groups). Notes applies policies — or changes to those policies — the next time the user logs in, rather than dynamically as they are made.

BCC, a leading supplier of Notes and Domino management tools, offers a solution that goes beyond user policies and takes Notes client management to the next level. BCC_ClientGenie is well known for its sophisticated management of Notes desktops, database icons, Replicator pages, and for its ability to manage all client configuration settings (see sidebar).

Client management with BCC

BCC defines Notes client management as managing all objects related to a specific user on one or more Notes clients to provide a predefined

corporate working environment. As such, a client management solution should enable administrators to manage the following complex objects:

- Notes client configuration (notes.ini and names.nsf)
- Desktop configuration (Workspace, Bookmark, and Replicator pages)
- Databases (and database servers)

Managing Notes clients means monitoring and maintaining these objects, taking their complex, multi-dimensional relationships into consideration. For example:

- Databases belong to Desktop, Workspace, and Replicator pages, as well as Location documents, and are stored locally and/or on different servers.
- Database icons and Replicator page entries are also related to Location documents.
- Specific users can use different Notes clients (e.g., notebook, desktop, and Citrix running Notes).
- Specific users can use different locations with a Notes client configuration (e.g., notebook users).

Client management is about monitoring and maintaining these objects in a configuration management process. BCC_ClientGenie provides an object-oriented configuration approach to Notes client management that allows an explicit and/or inherited detailed configuration of all objects.

Step-by-step management of your Notes clients

To set up a client management environment with BCC_ClientGenie, you need to follow these four critical steps: analyze, define, implement, and monitor.

1. Analyze your environment.

A deep understanding of your current environment and your typical client configuration is essential when implementing a client management solution. To gain this understanding, you need to collect and analyze client data. BCC_ClientGenie collects all the client information you need (e.g., client hardware and operating system information, Notes program and data directory, Location and Connection documents, replicas and replication settings, etc.) during the start-up of the Notes client without any user impact.

2. Define your corporate standard client.

Based on your analysis, you should define your corporate standards. You can then set up the standard configuration within BCC_ClientGenie's configuration database, following these steps:

- Apply a corporate standard to users' Notes workspaces and pages. We recommend adding a corporate page as the first page

ICODEX ClientGenie becomes BCC_ClientGenie

ClientGenie is a well-proven, leading technology solution that was originally developed by the Austrian company ICODEX Software AG (ICODEX has been a subsidiary company of BCC since June 2007). While ICODEX Software AG continues to focus on providing J2EE-based business process management solutions, BCC continues product development of ClientGenie based on BCC's 12 years of experience in the Notes client management area.

BCC_ClientGenie is BCC's strategic client management solution. With its unique technology, it provides the technical foundation of BCC's client management framework and allows for the development of further solutions by BCC. Released in December 2007, BCC_ClientGenie 4.0 combines the functions of BCC's earlier tool, BCC_ClientConfigurator and ICODEX ClientGenie 3.1.

on the workspace — for instance, a page displaying your company name.

- Identify all corporate databases that should be provided by default and add them to the corporate page. Automatically replicate these databases for local use on laptops.
- Add or change Location and Connection documents. Delete any unnecessary Location documents. Automatically add the user's Mail file to his or her desktop and replicate it to the user's laptop.

3. Implement a change management process to maintain control of your client.

Uncontrolled and poorly tested changes to your users' client configuration can and will lead to unplanned downtimes and a massive amount of help desk calls. Change management is an organizational process that coordinates changes to client configuration settings and provides detailed records of what has been changed and by whom. A change management process definition should contain change requestors, change approvers, and a defined rollout process, including a pilot and a final rollout.

BCC_ClientGenie supports this process with its internal approval workflow and its audit trail feature. Its internal logging tracks all changes within the configuration. Furthermore, BCC_ClientGenie's flexible settings allow you to perform a pilot by rolling out these new settings to a defined group of pilot users.

4. Update user desktops and monitor changes.

In the end, you must ensure that your defined client configuration is reflected on users' desktops. This may include adding pages and database links onto the workspace and updating or creating Location and Connection documents. Monitoring the update process ensures that the configuration update has been executed on every client.

BCC_ClientGenie updates users' desktops to reflect all defined changes once they've been approved and released. It also tracks the update process for future reporting or troubleshooting, providing detailed reports about updated configurations for each user. Using configuration rules, BCC_ClientGenie can identify user workstations and automatically

modify Location and Connection documents, icons, bookmarks, Replicator page entries, and other attributes as needed.

Advanced client management

Server consolidation or merger projects require special mass changes in your environment. To make these mass changes, you must change server names, database file names, and so on for all relevant client objects. BCC_ClientGenie provides special mass change requests to perform these changes both extremely fast and without any network bandwidth or server performance issues.

Conclusion

Client management is much more than simply applying policies to a user's Notes client. It must be integrated with organizational change management and process controls. Efficient and sophisticated tools like BCC_ClientGenie enable you to:

- Integrate and support the change management process
- Perform required configuration changes on users' desktops
- Track the progress of a client management project

To explore BCC_ClientGenie and see how it can benefit your organization, please visit www.bcc.biz/clientgenie.

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