Notes V10 Upgrades
Alles was man wissen muss!

Christoph Adler - panagenda

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17+ years of IBM (Lotus) solutions experience

Focused on

- IBM Notes Client Management
- Analysis and Optimization of ICS infrastructures
- Cloud onboarding
- Application Modernization

Good to know

- From Germany 🇩🇪
- Frequent traveler ✈️
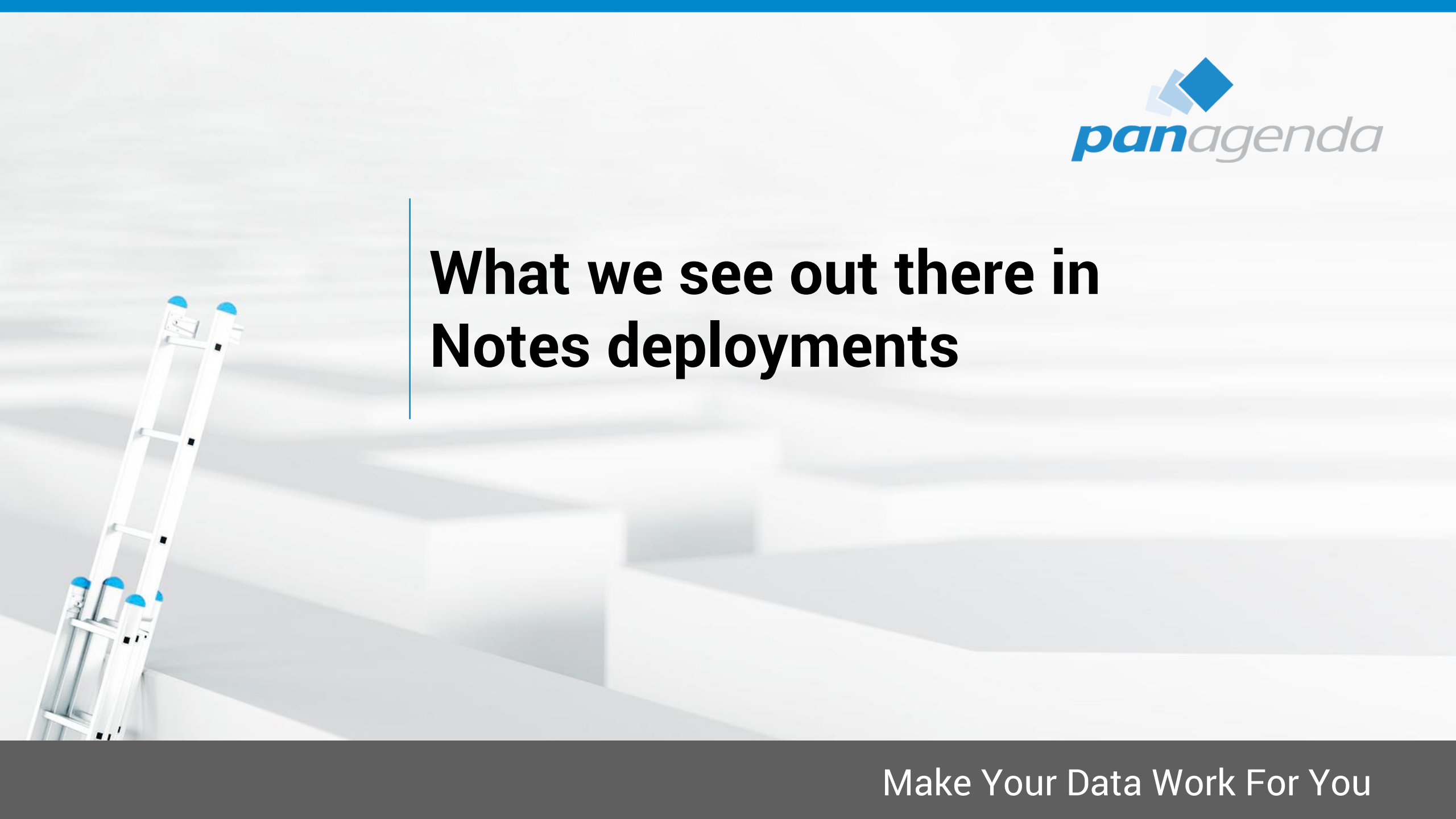- Geek 🤓
- Don't give energy drinks → squirrel mode 🐿️

Agenda

1. What we see out there in Notes deployments
2. Know your current environment
3. Define target (version and more …)
4. Choose Upgrade/Deployment Tool
5. Create Upgrade Package
6. Define post Upgrade actions
7. Test, pilot, production
8. Summary

What we see out there in Notes deployments

What we see out there in Notes deployments

- Lack of visibility and control

- Many different versions and many different installation types

- Uncontrolled configurations (Data Dirs, Locations, Connections, Accounts, Settings, Eclipse preferences, …)

- Not secure (JVM vulnerabilities, Code Signers, ECL Management)

- Mixed functionality – things don't work!

- The same end-user problems occur again and again (and again)

What we see out there in Notes deployments (2)

- Reluctance to upgrade

- Software deployment teams have little/no knowledge or "care factor" about Notes

- Administrators lack time and skill to utilize all available tools to effectively manage the Notes client

- Perception => it's too difficult and/or expensive / too risky for the business due to disruptions

Know your current environment

Know your current environment

- It's fundamentally important that your know the details about your current Notes Client Infrastructure to be able to make smart decisions for future deployments
  - Which exact versions are deployed?
  - Which Installation types and modes are used?
  - Locations of Program-, Data and SharedData-Dir?
  - Usage of Laptops, Desktops, Citrix and VDI in numbers/percentage?
  - Which OS incl. version is used?
  - Usage of Notes addons   Connections plugins, SwiftFile, CTI, … ?

- If you can't answer the questions above 100% correctly, the following two slides will help you a lot!

MarvelClient Essentials – included in IBM Notes/Domino 10.0.1

- Makes it easier, faster and cheaper to upgrade to IBM Notes 10.x
- Provides valuable insights into Notes client landscapes for Notes 9.x and beyond
- Helps reduce helpdesk tickets, support, client maintenance and upgrade efforts
- Runs on all Notes client platforms supported by IBM (Intel Mac 64 bit, Windows, Citrix and VDI)
- Runs on all IBM Domino platforms supported by IBM
- Best of all: **it's FREE and included in IBM Notes and Domino 10.0.1**

- If you are not on IBM Notes and/or Domino 10.0.1 now, you can get MarvelClient Essentials here: https://www.panagenda.com/essentials/

More information:
https://www.ibm.com/support/knowledgecenter/en/SSKTMJ_10.0.1/admin/wn_marvelclient_essentials.html
https://www-01.ibm.com/support/docview.wss?uid=ibm10737079
https://www-01.ibm.com/support/docview.wss?uid=ibm10737079&aid=1

MarvelClient Essentials – AnalyzeDB examples

113	14%	⊟ Windows 64 Bit
1	1%	⊞ Windows 10 Home, 64-bit (build 17134)
1	1%	⊞ Windows 10 Professional, 64-bit (build 14393)
1	1%	⊞ Windows 10 Professional, 64-bit (build 15063)
1	1%	⊞ Windows 10 Professional, 64-bit (build 16299)
12	11%	⊞ Windows 10 Professional, 64-bit (build 17134)
32	28%	⊞ Windows 7 Enterprise Edition, 64-bit Service Pack 1 (build 7601)
44	39%	⊞ Windows 7 Professional, 64-bit Service Pack 1 (build 7601)
2	2%	⊞ Windows 7 Professional, 64-bit (build 7600)
5	4%	⊞ Windows 7 Ultimate Edition, 64-bit Service Pack 1 (build 7601)
1	1%	⊞ Windows 7 Ultimate Edition, 64-bit (build 7600)
4	4%	⊞ Windows 8 Professional, 64-bit (build 9200)
9	8%	⊞ Windows 8.1 Professional, 64-bit (build 9600)

MarvelClient Essentials – AnalyzeDB examples (2)

183	13%	⊟ Notes – Basic vs. Standard vs. IBM Client Application Access
179	98%	⊞ Standard installed and running Standard client
2	1%	⊞ Standard installed but running Basic client
2	1%	⊞ < Notes 8
183	13%	⊟ Notes – Components
19	10%	⊞ Notes Client
164	90%	⊞ Notes Client + Admin Client + Designer Client
181	13%	⊟ Notes – Releases
37	20%	⊞ 8
144	80%	⊞ 9
183	13%	⊞ Notes – Single- vs. Multiuser
183	13%	⊞ Notes BrowserPlugin

MarvelClient Essentials – AnalyzeDB examples (3)

MarvelClient Essentials – AnalyzeDB examples (4)

175	13%	⊟ Notes – Releases
37	21%	⊟ 8
5	14%	⊞ Release 8.5.1
4	11%	⊞ Release 8.5.2
3	8%	⊞ Release 8.5.2FP2
2	5%	⊞ Release 8.5.2FP3
15	41%	⊞ Release 8.5.3
3	8%	⊞ Release 8.5.3FP1
1	3%	⊞ Release 8.5.3FP2
1	3%	⊞ Release 8.5.3FP3
3	8%	⊞ Release 8.5.3FP6 SHF577
138	79%	⊟ 9
22	16%	⊞ Release 9.0
1	1%	⊞ Release 9.0 SHF316
21	15%	⊞ Release 9.0.1
2	1%	⊞ Release 9.0.1FP1
3	2%	⊞ Release 9.0.1FP10
1	1%	⊞ Release 9.0.1FP10 SHF68
9	7%	⊞ Release 9.0.1FP2
3	2%	⊞ Release 9.0.1FP2 SHF63
1	1%	⊞ Release 9.0.1FP3
5	4%	⊞ Release 9.0.1FP3 SHF109
1	1%	⊞ Release 9.0.1FP3 SHF227
1	1%	⊞ Release 9.0.1FP3 SHF255
15	11%	⊞ Release 9.0.1FP4
4	3%	⊞ Release 9.0.1FP5 SHF106
14	10%	⊞ Release 9.0.1FP6
18	13%	⊞ Release 9.0.1FP7
1	1%	⊞ Release 9.0.1FP7 SHF155
1	1%	⊞ Release 9.0.1FP8
3	2%	⊞ Release 9.0.1FP8 SHF216
8	6%	⊞ Release 9.0.1FP9
4	3%	⊞ Release 9.0.1FP9 SHF55

Define target (version and more ...)

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Make Your Data Work For You

Define target (version and more …)

- Version is very easy at the moment → 10.0.1 FP1
  - Feature Pack 1 is planned for Q1 2019 (Status: Gold Candidate)

    http://www-10.lotus.com/ldd/fixlist.nsf/(Progress)/10.0.1%20FP1

  - Notes 11 will be shipped in Q4 2019 / Q1 2020

- Which Client Package?
  - Standard, Basic and/or ICAA (IBM Client Application Access)

- Which Installation type?
  - Single or **MultiUser**

Define target (version and more …) (2)

- Adding languages using MUI-Pack installation(s)
  - Multilingual User Interface
  - Group1, 2a, 2b and 3 → Group1 was finally released on 5th Feb 2019 – but ☹
    https://www-01.ibm.com/support/docview.wss?uid=ibm10870434
  - Group1 is expected to be released (together with FP1) soon
    - eGA - end of the month March 2019 → this week

- Current status for languages
  - Group 1 – Phase 1 (Standard)
  - Group 1 – Phase 2 (ICAA and Basic)
  - Group 2 languages (later → ~ same eGA as FP2)

Notes/Domino v11 Language Kits

- Re-engineering language kit generation process

- Selected language kits will be available for betas

- Simultaneous ship language kits with Domino v11

- Ship language kit fix packs as necessary

Define target (version and more …) (3)

- ## Where to deploy?

  - Laptops, Desktops, Citrix and/or VDI

  - Windows7, Windows10, macOS 10.13 and/or macOS 10.14

    https://www-01.ibm.com/support/docview.wss?uid=ibm10737113

Define target (version and more …) (3)

- Adding other functions/packages?

    – Sametime embedded → not needed, 10.0.1 is up-to-date

    – JVMPatch → not needed, 10.0.1 is up-to-date

    – SwiftFile → use latest version 4.2.1 here

        http://www-01.ibm.com/support/docview.wss?uid=swg24035896

    – IBM Connections Plugins for Notes → use latest version 5.5.0.20180813-1729 here

        https://xspy.mybluemix.net/nx

    – Programs/Applications who interacts/communicates with Notes

        - CTI, Instant Messengers, …

Define target (version and more …) (4)

- Let's assume (for this session) you want to Upgrade from Notes 9.0.1 FPx IFx to the following components:
  - IBM Notes 10.0.1 Standard Client → MultiUser Installation on Windows10 64Bit
  - Add French and Japanese (Multilingual User Interface = MUI)
  - SwiftFile 4.2.1
  - Connections Plugins for Notes 5.5.0.20180813-1729
  - Use of default paths for

    Program directory
    C:\Program Files(x86)\IBM\Notes
    Shared data directory
    C:\ProgramData\IBM\Notes\Data\shared
    Data directory
    C:\Users\<USERNAME>\AppData\Local\IBM\Notes\Data

Choose Upgrade/Deployment Tool – Notes Smart Upgrade

For <u>many many </u>reasons

I "personally" do not recommend to use "Notes Smart Upgrade"

Choose Upgrade/Deployment Tool – Third-Party-Solutions

- Third-Party-Solution for Notes

- Third-Party-Solutions for Windows, like SCCM, Empirum, LanDesk or others

Marvel Client Upgrade Free

danielle baptiste
@social_baptiste
Following

Happy Valentine's Day! ❤ Our fabulous partner @panagenda gives the gift of the #MarvelClient to help you get to Domino10 faster #DominoForever #IBMThink2019 #LetsConnect
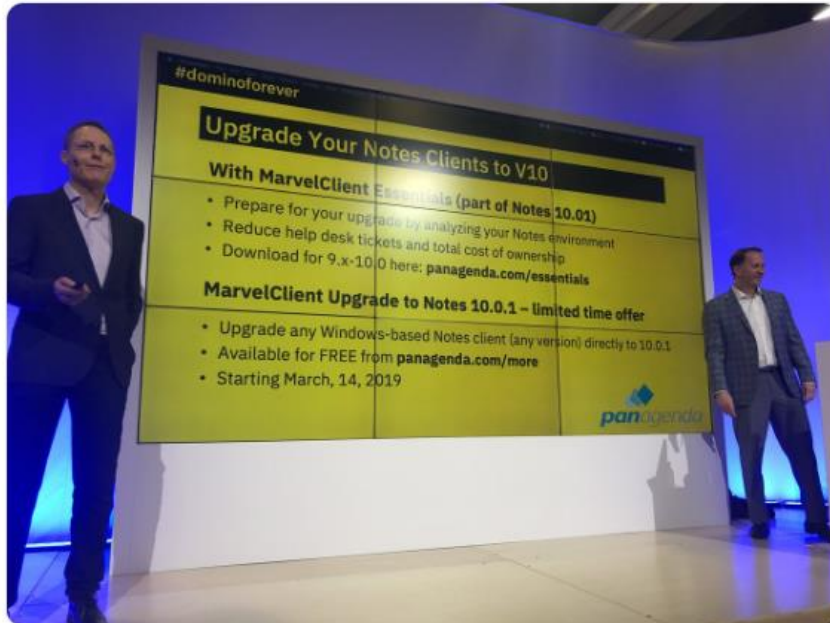
5:37 PM - 14 Feb 2019 from San Francisco, CA

#dominoforever   IBM

Notes 10.0.1 - Take Control of Your Notes Clients

MarvelClient Essentials

- Prepare upgrades and analyze your Notes environment
- Reduce help desk tickets and total cost of ownership
- Included as part of Notes and Domino beginning with 10.0.1
- Download for 9.x-10.0 here: **panagenda.com/essentials**

MarvelClient Upgrade to Notes 10.0.1

- Smartly upgrade any Windows Notes client directly to 10.0.1
- Available for FREE from **panagenda.com/more**

www.panagenda.com/free-upgrade

Marvel Client Upgrade Free (2)

Create Upgrade Package

Make Your Data Work For You

Create Upgrade Package

- No need to make changes to MSI package(s)

  – Scripts can help here

  – Differentiation between package and configuration (notes.ini, ConfigFile, etc.)

  – That will help you a lot when it comes to package changes, new versions and testing

- Always include an Uninstall part in your package

  – In-place upgrades **are not recommended**

  – You can use the package also in cases of a new or re-install

Create Upgrade Package (2)

Installation order

a) Uninstall current version
- Using NICE (Notes Install Cleanup Executable)
  https://www-01.ibm.com/support/docview.wss?uid=swg21459714

b) Run local cleanup
- Remove old Program- and SharedData-Dir

c) Install IBM Notes 10.0.1

d) Add French and Japanese languages (Multilingual User Interface = MUI)

e) Install SwiftFile 4.2.1

f) Install Connections Plugins for Notes 5.5.0.20180813-1729

g) Copy customized files like stub notes.ini, ConfigFile, etc.

Create Upgrade Package (3)

- Command lines for silent Uninstall and Cleanup

```
"c:\Install\NICE\nice.exe" -rp -qn -wipe"
rmdir "c:\Program Files (x86)\IBM\Notes" /s/q"
rmdir "c:\Program Files (x86)\IBM\SwiftFile" /s/q"
rmdir "c:\ProgramData\IBM\JVMPatcher" /s/q"
rmdir "c:\ProgramData\IBM\Notes" /s/q"
rmdir "c:\ProgramData\Lotus" /s/q"
```

- Command lines for silent Install/Upgrade

```
"c:\temp\Install\Notes_10.0.1\NOTES_V10.0.1_FOR_WIN_EN.exe" -s -a /s /v"SETMULTIUSER=1 /qn /lime "c:\temp\Install\Logs\NOTES_V10.0.1_FOR_WIN_EN.log""
"c:\temp\Install\MUI-GP1\NOTES_CLIENT_10.0.1_ML_UI_WIN_GP_1.exe" -s -a /s /v"ADDLOCAL=French,Japanese /qn /lime "c:\temp\Install\Logs\NOTES_CLIENT_10.0.1_ML_UI_WIN_GP_1.log""
"c:\temp\Install\SwiftFile_4.2.1\CIQ83EN.exe" /s /v"/qn /lime "c:\temp\Install\Logs\CIQ83EN.log""
"c:\temp\Install\CNXPluginsNotes_5.5.0.20180813-1729\setup.exe" /s /v"/qn /lime "c:\temp\Install\Logs\CNXPluginsNotes_5.5.0.20180813-1729.log""
```

- Command lines to copy customized stub notes.ini & ConfigFile

```
copy /Y "c:\temp\Install\customized_files\notes.ini" "c:\ProgramData\IBM\Notes\Data\notes.ini""
copy /Y "c:\temp\Install\customized_files\config.txt" "c:\ProgramData\IBM\Notes\Data\config.txt""
```

Create Upgrade Package (4)

- Check the log files (created during installation) for errors for all installed components

  – Successful

  ```
  MSI (s) (CC:54) [19:19:53:638]: Product: IBM Notes 10.0.1 -- Installation operation completed successfully.
  MSI (s) (CC:54) [19:19:53:638]: Windows Installer installed the product. Product Name: IBM Notes 10.0.1.
  Product Version: 10.01.18332. Product Language: 1033. Manufacturer: IBM. Installation success or error status: 0.
  === Logging stopped: 2/3/2019  19:19:53 ===
  ```

  – Not successful (with errors) – new installation needed after Windows restart (complete package)

  ```
  MSI (s) (CC:54) [21:29:46:536]: Product: IBM Notes 10.0.1 -- Installation operation failed.
  MSI (s) (CC:54) [21:29:46:536]: Windows Installer installed the product. Product Name: IBM Notes 10.0.1.
  Product Version: 10.01.18332. Product Language: 1033. Manufacturer: IBM. Installation success or error status: 1603.
  === Logging stopped: 2/3/2019  21:29:46 ===
  ```

Create Upgrade Package (5)

- Additional Information
  - For an installation on Citrix, please check out this slideshare:
    - https://www.slideshare.net/christophadler50/panagenda-webinar-virtual-faster-better-how-to-virtualize-ibm-notesv10

  - If you need/want to switch from Single to MultiUser
    - Check out the MUMA Tool (Multi-User Migration Assistant) – must be done before Upgrade to Notes 10.0.1
      - https://www-01.ibm.com/support/docview.wss?uid=swg21459627

  - A specific Third-Party solution can help here during Upgrade process – also if you want to migrate the DataDir from NetworkDrive to default local

Create Upgrade Package (6)

- Additional Information
  - Customized stub notes.ini (example)

```
[Notes]
KitType=1
SharedDataDirectory=c:\ProgramData\IBM\Notes\Data\Shared
InstallType=6
InstallMode=1
NotesProgram=c:\Program Files (x86)\IBM\Notes\
ConfigFile=c:\ProgramData\IBM\Notes\Data\config.txt
CREATE_R10_DATABASES=1
V10_WORKSPACE_BACKGROUND_MODE=1
```

  - config.txt (example)

```
Username=%USERNAME%
Domino.Name=Server/Certifier
Domino.Address=Server.hostname.local
Domino.Port=TCPIP
Domino.Server=1
AdditionalServices=-1
```

Define post Upgrade actions

Make Your Data Work For You

Define post Upgrade actions

- notes.ini changes for existing configurations (via MarvelClient Essentials or Policy)
  - Remove CREATE_R85_DATABASES=1
  - Remove CREATE_R9_DATABASES=1
  - Add CREATE_R10_DATABASES=1
  - Add NSF_UpdateODS=1
  - Add V10_WORKSPACE_BACKGROUND_MODE=1 → see next slide

IBM Notes 10.x – Workspace

- This will be controlled by a notes.ini parameter:
  - V10_WORKSPACE_BACKGROUND_MODE=0 → default (blue)
  - V10_WORKSPACE_BACKGROUND_MODE=1 → classic (grey lines)
  - V10_WORKSPACE_BACKGROUND_MODE=2 → customized

- If you choose for "2", make sure you have an image resource in your local bookmark.nsf named "$WorkspaceImage"
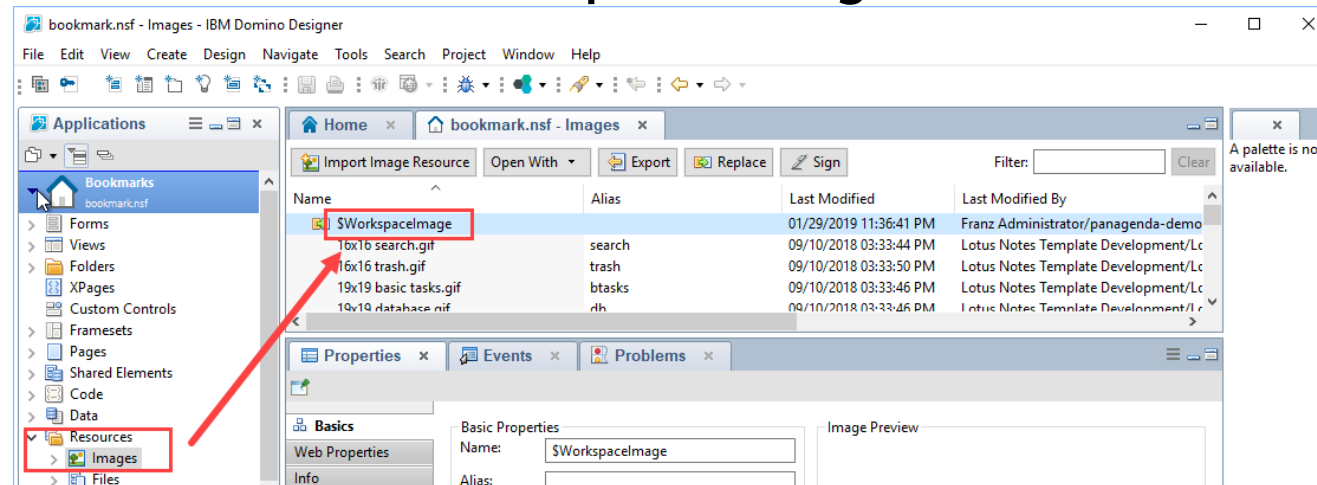
Test, pilot, production

Make Your Data Work For You

Test, pilot, production

- Test
  - Try to use virtual machines with snapshots
  - Use images, which is very close to your production configuration
    - Desktops vs. Laptops vs. VDI
    - ActiveDirectoy → GPOs (Group Policy Objects)
    - No local admin user rights
    - Enabled UAC (User Account Control)
    - Installed AV (Anti-Virus) Software

Test, pilot, production (2)

- Pilot
    - Choose the members of the pilot group wisely and let them know
    - 20 – 50 users from different departments and with different requirements on IBM Notes

- Production Deployment
    - Inform your ServiceDesk and your users before you push the button
    - Balance your deployment by upgrading e. g. 100-500 users at the same time – no more
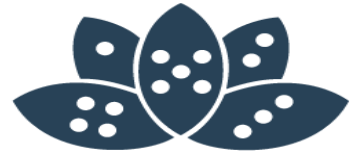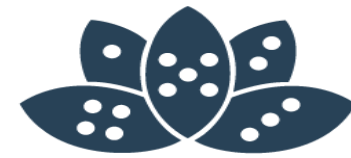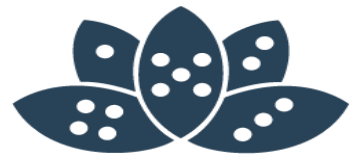
Summary

Summary

- You know your current environment

- You have a clear destination platform

- You have chosen your method and tools for the upgrade

- You have created your upgrade package(s)

- You have defined your settings on the new Notes platform

- You are ready to test, pilot, and roll out !

Q & A

Feedback please!

Vielen Dank !

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