

Nomad Roaming Setup and Examples

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Step 1: Check your versions

The following are required for Nomad Roaming

1. HCL Nomad Web 1.0.5 or higher, HCL Nomad iOS 1.0.24 or higher, or HCL Nomad Android 1.0.34 or higher
2. MarvelClient Config Template version 20220916 or higher
3. A MarvelClient license that includes Roaming



Getting the Latest Template

If you have an older version of the Config template, you can [run Online Update](#) to get the latest version that has been assigned to your account. If the template still isn't new enough, active licensed users can [contact panagenda support](#).

Step 2: Create New INI Filters from Examples

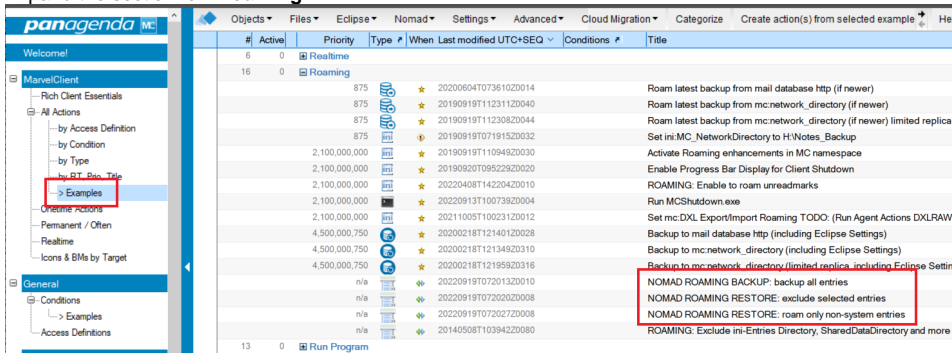
Open your Config DB, go to the view **All Actions – by Type**, and expand the category for **"INIFilter"** (if one exists).

#	Active	0/1	Priority	Type	Dev.	Plat.	Who	When	Last modified UTC+SEQ	Conditions	Title
5	5			INIFilter							
									20190918T161440Z0098		ANALYZE: Exclude ini-Entries Directory, Sh
									20220919T174834Z0012		NOMAD ROAMING BACKUP: backup all ent
									20220919T174834Z0010		NOMAD ROAMING RESTORE: exclude sel
									20220919T174834Z0010		NOMAD ROAMING RESTORE: roam only n
									20180929T132610Z0100		ROAMING: Exclude ini-Entries Directory, Sh
5	2			INIManagement							
1	1			JobBackup							
1	1			JobCompactDesktop							
1	0			JobLatency							
2	1			JobRoamingNomad							
1	0			JobRoamingRollback							
1	1			JobWriteXML							
1	1			LocationNomad							

If you already have INI Filters that have titles beginning with **"NOMAD ROAMING"**, you can skip this step! Otherwise, you'll need to add these to your filter list. You only have to do this once.

- Go to the view **All Actions – Examples**

- Expand the section for "Roaming"



- For each of the example actions with a title beginning with "NOMAD ROAMING", do the following:
 - double-click the action to open it
 - click "Create action from this example" at the top of the action form
 - when the new action is created, set it to **Enabled** (click the checkbox next to "Disabled" at the top right), then save and close it
 - you should now see the action in the All Actions – by Type view

Step 3: Create a new Nomad Roaming Action

Now go back to the All Actions – By Type view.

At the top of the view, click the "Nomad" dropdown menu, and choose the "N1.5 Nomad Roaming" option. This will open a new Nomad Roaming action that looks like this:

Nomad Roaming Configuration

Server:

Filename incl. Directory:

View (Alias):

Roaming Key:

What to roam:

☒ desktop.xml
 ☒ images.xml
 ☐ Only roam bookmark cache documents newer than 0 days
 ☐ Formula to select bookmark cache documents

☒ bookmark.xml
 ☒ bookmark.dxl
 ☒ notes.ini
 ☒ recentapps.xml

Perform first roaming:

Run every: minutes

Roaming

Roaming INI Filter:

Backup

☐ Backup files in addition to roaming:

Backup INI Filter:

Easy Setup: Choose INI Filters and Save

In most cases, you just need to:

- give the action a name
- select your **INI Filters** (from Step 2)
- **save and close** the action

The default values are usually the best options, and unless you've customized your MarvelClient environment with a non-standard Analyze DB name or location this action should work for you out of the box.

Custom Setup: Explanation of the Fields

If you do want to customize the action, here is an explanation of each of the fields/sections on the action form.

field	default value	description
Server	<mc: configdb_server>	The server where your Analyze DB is located. The default value of means "the same server as your Config DB"
Filename incl. Directory	<ini: MC_UploadDB=pa nagenda\mc_analy ze.nsf>	The filename of your Analyze DB, including the relative file path. The default value means "use the MC_UploadDB notes.ini parameter if it exists, otherwise use panagenda\mc_analyze.nsf"
View (alias)	v_upload_realtime	The view in the Analyze DB where Nomad Roaming backups can be found. Do not change this unless instructed to do so by panagenda Support.
Roaming Key	% NOTES_USER_A BBREVIATED%	The unique key that identifies each user's backup. Do not change this unless instructed to do so by panagenda Support.
What to roam	All XML, DXL, and INI entries checked Bookmark Cache checkboxes unchecked	These checkboxes control which files get roamed, and how the bookmark cache gets treated. Do not change this unless instructed to do so by panagenda Support.
Recent Apps	merge Recent Apps	When Recent Apps are roamed from a backup set, you have two options: <ul style="list-style-type: none">• merge, which will combine the existing recent apps with the ones in the backup set, using a best-guess about the order from first to last• replace, which will completely replace the existing recent apps with the ones from the backup set
Perform first roaming	immediately at startup	When the Nomad client starts up, you have two options: <ul style="list-style-type: none">• roam immediately at startup, which will slightly delay the client startup but will guarantee that the workspace has roamed when it becomes visible• roam in the background after startup, which will cause roaming to happen after the workspace has become visible, providing a slightly faster startup but which might cause the workspace to be reloaded shortly after it becomes visible Be careful changing this setting , because if you have MarvelClient actions that modify the workspace, they could get overwritten by roaming with the "background after startup" option. You will normally want to use the default "immediately at startup" option.
Run every	15 minutes	Roaming continues to happen in the background as the client is running, checking for and applying new backup sets as needed, and uploading any relevant changes that were made. This setting defines how often the background sync happens. However, the scheduled sync will only happen if there has been user activity since the last sync. So if a user stops using Nomad for an hour but leaves it open, no sync will be attempted during that hour. Setting this to run too frequently (like every minute) could cause excessive communication between your Nomad client and the server.
Roaming INI Filter		Defines which notes.ini variables from a backup set are included or excluded when the backup set is applied to the local Nomad client.

		You should normally use one of the predefined NOMAD ROAMING RESTORE filters from Step 2 above. Some ini settings can cause a Nomad client to stop working properly if they are applied incorrectly.
Backup files in addition to roaming		Checking this box allows you to add the config.xml file to the roaming backup set. This is normally not needed and is generally only useful for troubleshooting.
Backup INI Filter		Defines which notes.ini variables are added to a backup set when it is created. This is less dangerous than the Roaming INI filter, and normally you will want to backup almost the entire notes.ini file. The example NOMAD ROAMING BACKUP filter from Step 2 above is a good one to use.

Custom Setup: Runtimes and Persistence

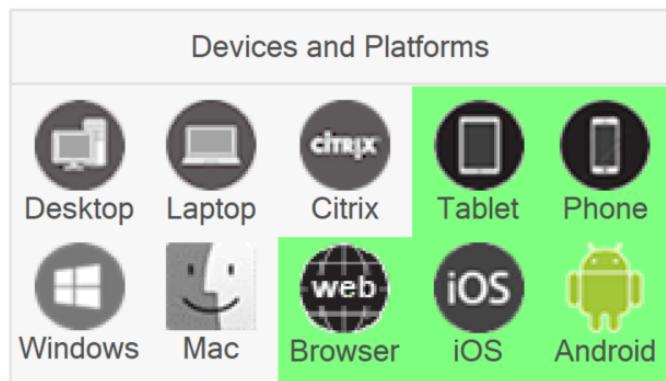
The default Nomad Roaming runtimes and persistence settings are shown below:

Click on cells to en/disable										Runtypes & Repeat			<input type="checkbox"/> Run On Reference Only	
START			LOGIN				User Interface			END				
Before Login (BL)			After Login (AL)				Whilst Client is up and running			Client Shutdown				
BL Init	Before Login	ExitNotes	Before DL	Before Sync	Before Roam	After Login	After Write	Backgr. Init	FSAC	Backgr.	Shutdown			
<input checked="" type="checkbox"/> Persistent <input type="checkbox"/> Once only <input type="checkbox"/> Once a day only <input type="checkbox"/> Once from start to end <input type="checkbox"/> Limit # of exec.:														

Do not change any of these settings. Nomad roaming will not work properly if you do.

Custom Setup: Devices and Platforms

By default, the Nomad Roaming action is enabled for all Nomad devices and platforms:



You can customize this (and have multiple roaming actions) to create configurations like:

- only roam between browsers, but leave mobile devices alone
- roam phones and tablets separately

Setting up these sorts of situations could require other settings too (like custom roaming keys), and you should consider [contacting panagenda support](#) before attempting a configuration like this.