

Automate replace design of your user's mail databases

MarvelClient offers two ways to automate replacing the design of a user's mail database if the template version is not up to date:

1. With **MarvelClient Upgrade** you can initiate replacing the design of the user's mail database immediately after a Notes client is upgraded, using the "success" email generated by the upgrade process.
2. Based on user data (Notes version and current mail template name) in the **MarvelClient Analyze database**, you can replace the design of a user's mail database using a **scheduled agent**.

Both options (MarvelClient Upgrade success email and scheduled agent) can be used side by side, and if necessary option 2 can complement option 1.

This can be useful for updating a user's mail template to the latest version after the Notes client is upgraded to a new client version. It can also be used to deploy a customized mail template to specific users.

 This requires MarvelClient Analyze database template version 20230516 or higher, a full MarvelClient DLL (not Essentials), and at least a MarvelClient Basic license. Please use [Online Update](#) to get the latest template version that has been assigned to your account, and [contact panagenda support](#) if you need help.

Preparing Your Infrastructure

Domino Server Configuration

- Replicate the new mail template(s) to all mail servers using the same path relative to the Domino Data directory.
- The signer of the **'Replace Database Design'** scheduled agent needs to have at least Designer rights to the mail databases.
- The signer of the scheduled agent also needs to be in the "Full Remote Console Administrators" field for the server document of all mail servers:

Server: Server1/DominoTest domino1.pana.local

Basics | Security | Ports... | Server Tasks... | Internet Protocols... | Miscellaneous

Administrators

Full Access administrators: LocalDomainAdmins

Administrators: Johnny Admin/DominoTest
LocalDomainAdmins

Database Administrators:

Full Remote Console Administrators: FullConsoleAdmins

View-only Administrators:

- In addition it's possible that **the server that the agent runs on** needs to be listed in the "Full Remote Console Administrators" field as well as the "Trusted Servers" field for all mail servers that have mail databases that might be updated:

Server Access Who can -

Access server: All users can access this server

Not access server:

Create databases & templates:

Create new replicas:

Create master templates:

Allowed to use monitors: *

Not allowed to use monitors:

Trusted servers: TrustedServerGroup

This HCL technote has more information on these requirements: https://support.hcltechsw.com/csm?id=kb_article&sysparm_article=KB0093468

MarvelClient Config DB Configuration

In order to detect what mail templates are currently being used, you will need two different MarvelClient actions to run on your users' machines:

1. Create a **Run Agent** action that runs the the agent '**X. Addon PERNAB: Collect LocalNamesDetails**' from the MarvelClient Analyze DB. Instructions for setting this up can be found in the article: [Get Location and Connection Information](#)
 - a. This requires the agent from [MarvelClient Analyze DB template version 20230420](#) or higher
 - b. If you are already using a Run Agent action with this agent, you will need to open it in edit mode and use the "Check For Update" button to get the latest version of the agent from the Analyze DB after you've updated your template version

The screenshot shows the configuration for a 'run agent action'. The 'Source Database' section shows the server as '[Local]' and the filepath as 'panagenda\local_analyze_dev.nsf'. The 'Source Agent' section shows the agent name as 'X. Addon PERNAB: Collect LocalNamesDetails'. A red arrow points to the 'Check for Update' button.

2. Create a **Backup** action that saves MarvelClient XML files to your Analyze DB. You can use the example action in the Config DB for this purpose, as described here: [The readily prepared backup Action in detail](#)

Replace Design Configuration in the MarvelClient Analyze database

The same configuration in the MarvelClient Analyze database is used by both the MarvelClient Upgrade and the scheduled agent options.

In the left-hand navigator, go to '**MarvelClient Upgrade – Mail template by Notes version**' to see the Notes version vs Mail template name of your users. This view requires the collection of the user's mail template name from the '**X. Addon PERNAB: Collect LocalNamesDetails**' agent as described above.

This view lists the **mail template name** by **Notes client version** and gives an overview of your current mail database design situation. **Full clients only:** no Nomad (iOS, Android, Nomad Web) clients

The screenshot shows the 'MarvelClient Upgrade' configuration interface. The left-hand navigator shows the 'Mail template by Notes version' view. The main table displays the following data:

#	%	Notes Version	TemplateName	User
1	50%	12000100		
1	100%		StdR10Mail	panagenda\K
1	50%	12000200		
1	100%		StdR12Mail	panagenda\K
2	100%			

The view below that in the navigator is '**Replace Design Configuration**':

The screenshot shows the 'MarvelClient Upgrade' configuration interface. The left-hand navigator shows the 'Replace Design Configuration' view. The main table displays the following data:

Current Mail template name	0/1 New Mail template path	Min Notes version to process	MCUpgrade package name
StdR10Mail	mail11.nsf	11000100	11-0-1-ML
StdR12Mail	mail12.nsf	12000200	Notes_1101-FP3-de

This view will be empty at first. In order to create configuration entries, simply use the '**Reload templatenames**' button. This button will add an entry for each mail template name found in the '**Mail template by Notes version**' view, leaving existing entries untouched. If there are any additional mail template names in your environment that need a configuration entry, simply press the button again to create one for them.

Every entry represents a single configuration.

- The '**New Mail template path**' is required and is relative to the home mail server of each user. Use '**Set – Mail template path**' to enter the path or click in view to edit.
- The '**Min Notes version to process**' is only required if the configuration should be processed by the scheduled agent. Use '**Set – Notes version**' to select a version (based on existing MC Analyze data) or click in view to edit.
- The '**MCUpgrade package name**' is only required if the configuration should be processed by an incoming MarvelClient Upgrade SMTP success email. Use '**Set - MCUpgrade package name**' to select a name (based on existing MC Analyze data) or click in view to edit.

Replace Design using MarvelClient Upgrade with SMTP mail

 In order to use this option, the Notes "short" user name (e.g. jsmith) **must be the same** as the Windows login name

In the MarvelClient Config DB, on the MarvelClient Upgrade configuration '**Tracking**' tab, choose one the 'Send...' options for '**Send SMTP Progress Emails**'.

Click on the following button when you are done with reviewing / filling in the below table:

Prepare or Publish Upgrade

Distribution	Conditions	Elevation	User Experience	(Un)Install	Setup	Citrix	Tracking
Send SMTP Progress Emails:	☒ Send interim progress messages ☐ Send final results and waiting states only ☐ Do not send any messages						
Email on Deferral?	☐ Send SMTP Info mail on deferral						

SMTP Settings

Using this option, after a Notes client is successfully upgraded, an email will be sent to the MC Analyze DB. This triggers a template replacement for that user's mail database in the following way:

1. The success email is processed by the agent '**(Before New Mail Arrives - MarvelClient Upgrade)**' in the MC Analyze DB
2. This agent searches the 'Replace Design Configuration' view for documents matching the user's **Current Mail template** and **MCUpgrade packagename**
3. If a match is found, and the matching document is enabled, a console command (load convert -u ...) is sent the user's Mail server. This command will be processed immediately on the server.
4. After the mail template upgrade is successfully completed, the next time the user opens their mail database they will see the new design.

NOTE: If a Replace Design Configuration document matching the user's **Current Mail template** and **MCUpgrade packagename** is not found, nothing will be done!

Replace Design using a Scheduled Agent in MarvelClient Analyze database

Setting up the scheduled agent requires the following steps:

1. Make sure all the steps in the **Preparing Your Infrastructure** and **Replace Design Configuration** sections above are complete
2. Make sure the '**Replace Database Design**' agent is enabled and scheduled (double-check the agent signer again after doing this!)

The scheduled agent '**Replace database design**' searches the 'Replace Design Configuration' view for documents matching the user's **Current mail template name** and **Min Notes version**.

If a match is found, and the matching document is enabled, a console command (load convert -u ...) is sent the user's Mail server. This command will be processed immediately on the server, and the next time the user opens their mail database they will see the new design.

NOTE: As always, please test thoroughly before implementing. Your users will thank you!