



LOTUS to SharePoint Migration Services



Microsoft
GOLD CERTIFIED
Partner

Key Discussion Points



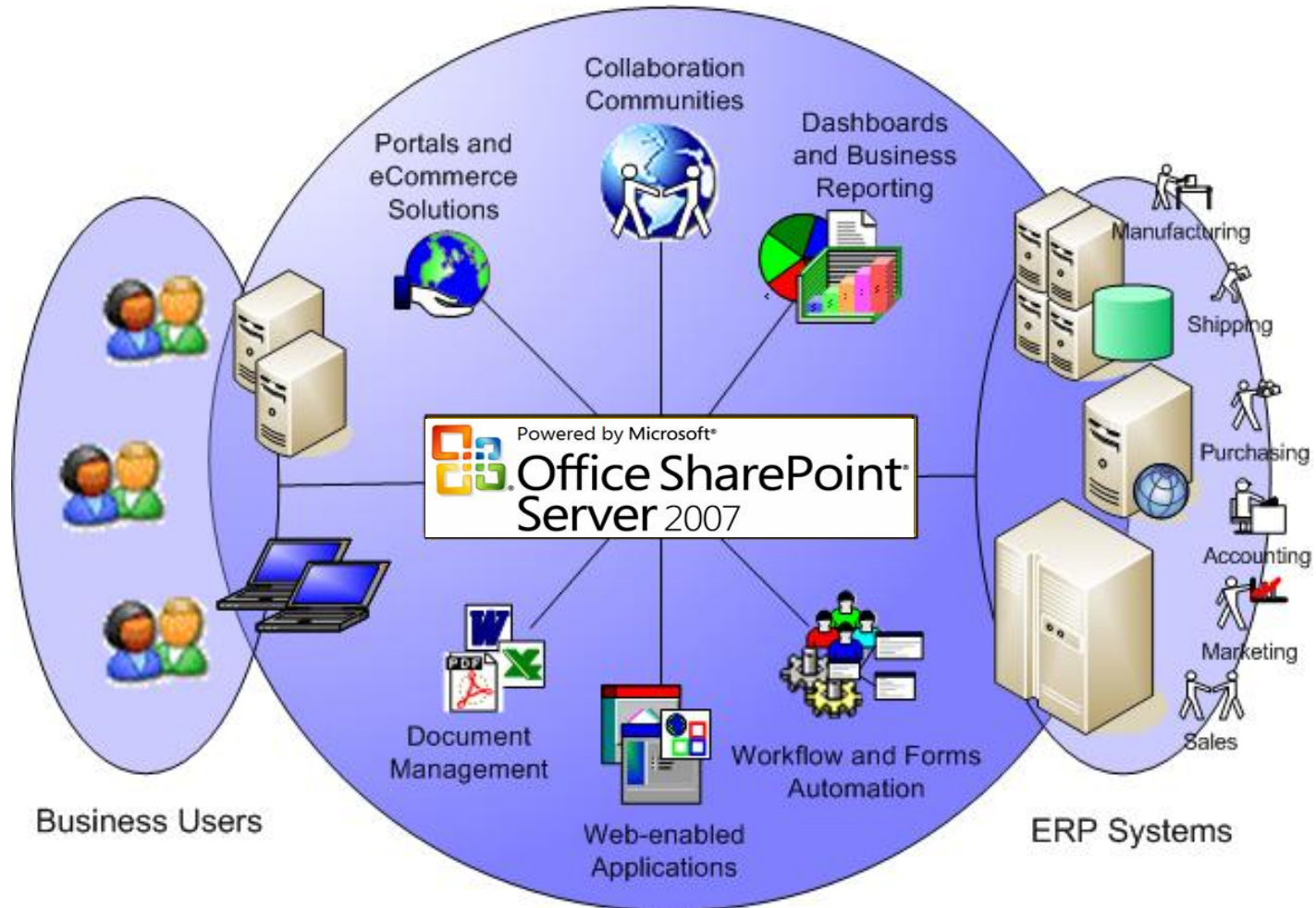
- **StarSoft Value Proposition**
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StarSoft Value Proposition



- **StarSoft has developed a migration service framework to help organizations implement a consistent Lotus Notes to SharePoint migration process.**
- **StarSoft's Four Phase Methodology and hybrid on and off-shore delivery model ensures consistently superior migrations:**
 - **Delivered to Requirements**
 - **Delivered on-budget**
 - **Delivered on-time**
 - **Delivered with QA (Supported by Microsoft-India)**

Microsoft Office SharePoint Server 2007 (MOSS)

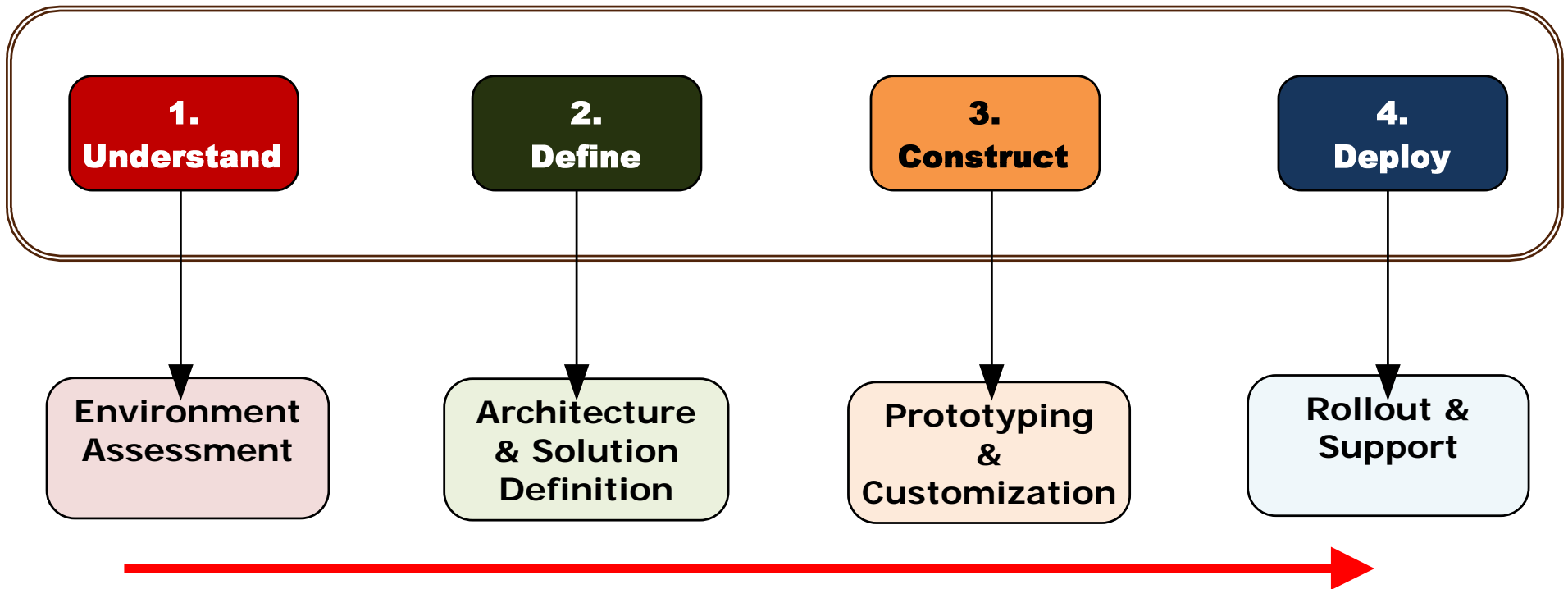


Lotus Notes: Current Marketplace Trends



- **Lotus Notes has been an idle technology for a number of years.**
- **No new features have been added until very recently**
 - **Market’s response was, “too little, too late.”**
- **While very few new customers have purchased Lotus products there are still approximately 70 million users worldwide.**
 - **Many Lotus customers are considering moving to another technology for their e-mail and collaborative applications.**
- **This activity has created a need for a professional services to assist with SharePoint migration projects. Planning and executing migrations can be difficult and time consuming.**
 - **Companies need a professional and accurate method to migrate the large amount of information within their Lotus data environment.**

StarSoft LSSP ® Migration Methodology



Phase 1: Understand

Environment Assessment



1. **Define Business & Migration Objectives**
2. **Assess Operational Characteristics & Notes User Culture**
3. **Analyze LOTUS Application Portfolio**
4. **Run Application Analyzer Tool ***
5. **Analyze Notes Database Structure**

Phase Deliverables
<ul style="list-style-type: none">• Discovery / Analysis Document based on the current Notes Environment , with focus on analyzing difference in Data and Design of Notes Environment.
<ul style="list-style-type: none">• Installation of Application Analyzer Tool
<ul style="list-style-type: none">• Review of the Notes Environment
<ul style="list-style-type: none">• Initial Approach & Scope Statement of Work SOW

* Microsoft Application Analyzer 2006 for Lotus Domino

Migration Planning Questions: Samples



- **How many Lotus Notes databases are in the environment?**
- **Which databases are actively used to record and manage data?**
- **Is there an agreed priority order?**
- **Does a database have to be migrated or could it be archived “ as-is”?**
- **Does the data need to be just viewable or workable?**
- **How much data is in each database (number of documents, total Mb space used)?**
- **How 'clean' is the data?**
- **How many different forms are used in each database?**
- **Is there common 'Keyword' data for list of departments, Users, Locations etc?**
- **Is the workflow simple or complicated for each document?**
- **Does data need to be presented in Views and on documents in a particular way - does it need a specific style?**
- **Are MS Word and InfoPath as well as native SharePoint in the planned environment?**
- **Any constraints for completion of certain databases and systems in SharePoint?**
- **Is data complicated e.g. calculations and busy forms?**
- **Are there complex relationships between Lotus Notes documents?**

Phase 2: Define

Architecture & Solution Definition



1. **Identify Migration Requirements**
2. **Review & Understand Lotus Notes Forms and Views**
3. **Review & Understand SharePoint Site Layout, List, Document Library And Site Collection User Permission**
4. **Identify Destination SharePoint Data Source & Mapping**
5. **Create Migration Plan**

Phase Deliverables
<ul style="list-style-type: none">• Technical Design on the Migration Approach
<ul style="list-style-type: none">• Final Statement of Work (SOW) for Time and Cost for Migration
<ul style="list-style-type: none">• Final Migration Plan

Phase 3: Construct

Prototyping & Customization



1. **Map And Migrate Target Databases**
2. **Validate Functionality & Data**
3. **Conduct Migration Pilot**
4. **Perform Migration Readiness Analysis**
5. **Phase Migration Rollout Roadmap By Business Criticality, Users, etc.**

Phase Deliverables
• POC Solution- Migrate 2 databases from Notes to SharePoint
• Migration Readiness Analysis
• Migration Pilot
• Project Plan for the Rollout

Phase 4: **Deploy**

Rollout & Support



- 1. Optimize Performance of Target Infrastructure**
- 2. Migrate Databases Data**
- 3. Provide Support During Databases Data Migration**

Phase Deliverables
• Migration of all the Database
• Migration of Applications
• Migration: Validate & Test

StarSoft Development & Testing Environment



StarSoft Technical Environment
Notes Data Extraction
OS: Windows XP, Vista or 2003
Lotus Notes Client 6.0 or later to connect to remote notes or servers on any platform
.NET Framework 3.0
Migration Tool
SharePoint Data Load
Windows 2003
Office SharePoint Server 2007

Migration Strategies



- **Single Phase Migration: This strategy bypasses any coexistence with other infrastructure; it begins with the migration of relevant data to the new platform.**
- **Multiple Phase Migration: This strategy utilizes coexistence with the old collaboration platform while both platforms are in use. The length of migration depends on the customer's specific requirements.**

Phased Migration: Types



- ❖ **Directory Integration - This phase synchronizes user name and e-mail address information between Active Directory® directory service and the Lotus Domino Directory.**
- ❖ **Mail Migration - This phase moves users' mail database data from Lotus Domino to Exchange Server.**
- ❖ **Application Migration and Coexistence - This phase moves applications from Lotus Domino to Microsoft products. Microsoft® SharePoint® Products and Technologies and .Net are used to access data that remains on Domino servers.**

Migration Path - Example



1. **Synchronize Active Directory and Lotus Domino Directory - Exchange Connector**
2. **Route mail between Exchange and Lotus Domino - Exchange Connector**
3. **Perform free/busy lookups between Exchange and Lotus Domino - Exchange Calendar Connector.**
4. **Migrate users' data from Lotus Domino mail databases to Exchange mailboxes - Exchange Migration Wizard.**
5. **Retire Domino mail servers.**
6. **Analyze Domino applications:**
 - a. **Identify which applications are active and which applications should be archived.**
 - b. **Eliminate admin and mail applications from the migration or integration list.**
 - c. **Determine which applications to migrate and which to integrate with MS technologies.**
7. **Build Proof-of-concept to test migration to new or existing applications.**
8. **Migrate or integrate applications, or move to existing applications or off-the-shelf applications - Microsoft Application Transporter for Lotus Domino, .Net or third-party tools.**

Microsoft Migration Tools



- **Microsoft Application Analyzer for Lotus Domino**
- **Microsoft Application Transporter for Lotus Domino**
- **Windows SharePoint Services Application Templates**
- **Messaging and Coexistence Tools**



Microsoft Application Transporter -1

Microsoft Software



- Provides option for Co-existence between Lotus Domino and Active Directory with Exchange Server 2007.
- Enables migration Lotus Domino to SharePoint Server.
- Enables interoperability between Lotus Domino and Exchange Server 2007.
- Enables migration: users and Groups from Lotus Notes to Active Directory.
- Enables migration: mail, address book and personal archives from Lotus Notes to Exchange 2007.
- Facilitates the migration of application from Lotus to Windows SharePoint or MOSS 2007.
- Provides interfaces:
 - Management Console: GUI used for basic migrations.
 - Management Shell: Adds functionality to the Microsoft Windows PowerShell command-line interface to run single commands or script a series of commands. Used for complex command line or scripted migrations.

Microsoft Application Transporter - 2

Microsoft Software



Microsoft Application Transporter Suite consists of following tools:

Feature	Description
Connector	Synchronizes users, groups, and Domino mail-in database information between the Windows Active Directory and the Lotus Domino Directory.
Free/Busy Connector	Used in the coexistence phase to enable Lotus Notes and Microsoft Office Outlook® users to perform free/busy queries against both Lotus Domino and Microsoft Exchange Server 2007 servers when scheduling meetings
Directory Migration	Creates or merges Active Directory accounts for Domino user objects
Group Migration	Creates or merges Active Directory groups for Domino group objects
Mailbox Migration	Migrates information from Domino Mail databases to Exchange Server 2007 mailboxes
PAB and Archive Migration	Migrates information from PAB (Personal Address Book) and Personal Archive databases to Exchange Server 2007 mailboxes
Application Analysis	Gathers and reports information from Domino applications
Application Migration	Migrates information from Domino applications to Windows SharePoint Services 3.0 and Office SharePoint Server 2007

Notes Migrator for SharePoint

Quest Software

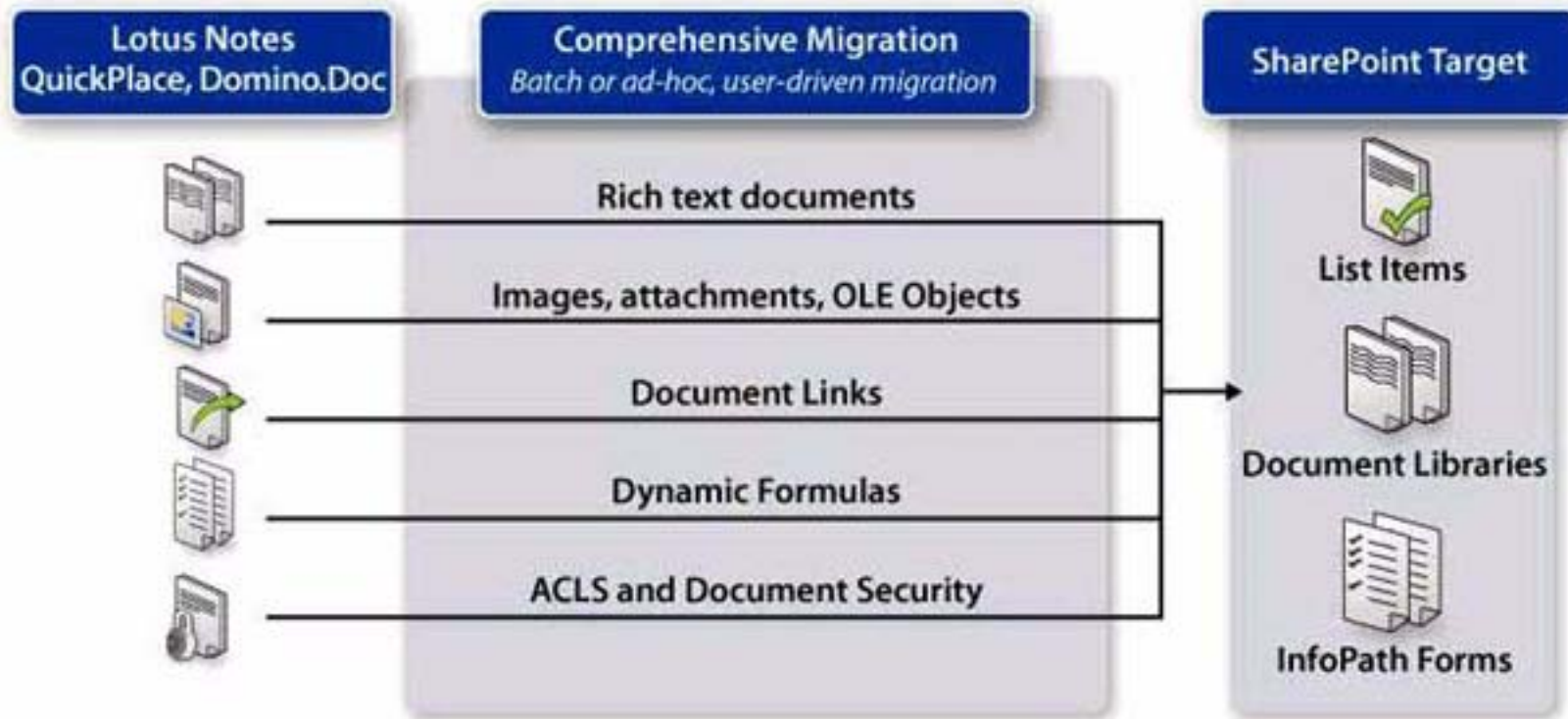


- **Quickly and easily migrates Lotus Notes and Domino databases, Lotus QuickPlace sites, or Lotus Domino.Doc cabinets**
- **Automatically maps Notes fields to SharePoint fields based on predefined rules**
- **Automatically detects when predefined data definitions can be applied (based on the Notes and SharePoint templates used)**
- **Allows you to customize Notes and SharePoint data access details as well as data mapping rules**
- **Saves customized data definitions for future use**
- **Includes command-line mode for batch processing**
- **Provides detailed event logging**



Notes Migrator for SharePoint

Quest Software



Microsoft & Quest Migration Tools

Comparison - Key Features



Microsoft Tool	Quest Tool
Basic Lotus to SharePoint migration of specific standard Notes templates.	Complex Lotus to SharePoint migration activities.
Support Notes migration for directory synchronization and free/busy look up capabilities	Support for enhanced HTML text fields, including embedded in-place images, tables, etc.
	Migrate from Lotus QuickPlaces to SharePoint.
	Migrate from Lotus Domino.Doc to SharePoint 2007.
	Conversion complex Notes documents to InfoPath.
	Drag & Drop documents from Notes client to SharePoint targets for ad hoc, user-driven migration.
	Conditional Migration of Data based on content type.
	Option for mapping duplicate document.
	Option - Delete Notes documents as migrated.
	Option - migrate embedded document and converting them to standalone document like word, etc.
Option - real time migration without SharePoint server log-on and deployment of Notes DLLs to SharePoint.	

[Reference Appendix: Advanced Features of the Quest Tool](#)

StarSoft Technical Resources



StarSoft will provide a mix of the below resources all with 6 + years of experience working on or leading client projects.

Project Resources	Skills
Project Manager	Project envisioning, planning, development & deployment Project Plan Monitoring & Management
Migration Analyst	Windows 2003/2008 Exchange 2007 MOSS 2007 and WSS 3.0 Active Directory Mail and Application Migration Knowledge in MTS Knowledge in Microsoft Transporter Suite and Quest Notes to SharePoint Migrator Build Prototype Participate in deployment and configuration
SharePoint Programmer	Windows application development in C# HTML, XML, XSLT, CSS and JavaScript Microsoft SharePoint Microsoft Visual SourceSafe Microsoft Visual Studio .Net
QA Analyst	Unit Testing and System Testing Bug Tracking Bug Fixing



- **Microsoft Corporation (India) Technical Consultants will be engaged on all Lotus to SharePoint Migration Services in the following roles:**
 - **Technical Advisors**
 - **Quality Assurance**

Next Steps



The typical Next Steps process includes meeting with you and your colleagues to understand your business and technical requirements and prepare a pricing proposal, SOW and project Plan as outlined below.



Contact Information



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Appendix: Additional Knowledge



Quest Notes Migrator for SharePoint Advanced Feature Set

Notes Migrator for SharePoint: Advanced 1

Quest Software



- **Provision new SharePoint lists and document libraries from scratch.**
- **Support for enhanced HTML text fields, including embedded in-place images, tables, etc.**
- **Ability to convert DocLinks to "notes:" links or Domino links.**
- **Link Tracking Service ensures that your DocLinks continue to work before, during and after your migration process, regardless of the order of document migration.**
- **Convert complex Notes documents to InfoPath documents.**
- **Migrate from Lotus QuickPlaces to SharePoint.**
- **Migrate from Lotus Domino.Doc to SharePoint 2007.**
- **Utilize dynamic formulas to transform data during migration (examples: @DbLookup, @Implode)**
- **Utilize dynamic formulas or full text searches to select documents (example: MigrateFlag = "1").**
- **Dynamically derive folder names for files added to document libraries.**
- **Override generated file names for extracted images, HTML files, MIME files, etc.**
- **Render an entire Notes document (including form layout, rich text, embedded images and attachments) to a single MIME (MHT) file.**
- **Drag & Drop documents from Notes client to SharePoint targets for ad hoc, user-driven migration.**
- **Map calendar entries, including repeating entry logic.**
- **Support for Notes/Domino release 5 and higher.**

Notes Migrator for SharePoint: Advanced 2

Quest Software



- **Integrate Active and Domino Directories or XML files.**
- **HTML for SharePoint Lists:**
 - ** tags point to corresponding List Item attachments so images appear in place.**
 - **Embedded attachments are converted to <A> tags so they appear in place.**
- **Map Notes security constructs (ACL, roles, groups, document-level reader/author fields) to the equivalent constructs in SharePoint.**
- **Integrate archival and functionality into Notes/Domino application using LotusScript API.**
- **Skip N records in a query (enables, for example, migrating 1000 records at a time).**
- **Map Notes rich text fields (embed images, OLE objects and attachments) to single MIME (MHT) file.**
- **Mapping duplicate documents: write new item, replace existing item, create new version, skip item. (These options allow for running the same migration job repeatedly, perhaps on a scheduled basis.)**
- **Automatically set approval status of each document migrated to SharePoint based on Input data.**
- **Dynamically assign content types & certain data fields can be conditionally migrated.**
- **Migrate embedded OLE objects, convert to stand-alone document files (DOC, XLS, PPT, DOCX, PDF)**
- **Remote load capabilities allow real time migrations without log on SharePoint server and without having to deploy Notes DLLs to SharePoint server.**
- **Remotely design custom SharePoint data definitions without log on to the SharePoint server.**
- **Delete Notes documents as they are migrated (ideal for scheduled processing of a mail-in database).**
- **Per-user configuration supports operating Notes Migrator for SharePoint on shared machines.**