

Porting from IBM Lotus to Microsoft Exchange and Microsoft SharePoint platforms

Exence competence description

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Introduction

The following document contains description of Exence's competence in porting mail servers from IBM Lotus platform to Microsoft Exchange and in porting IBM Lotus based applications to Microsoft SharePoint. Mail servers porting can also come together with porting from IBM Lotus Sametime to Microsoft Lync.

The first section of this document addresses Lotus to Exchange porting, the second Lotus apps to SharePoint porting.

Based on Exence's team experience porting methodology was developed for that kind of projects. Key best practices from that methodology are listed in this document.

Porting mail servers from IBM Lotus to Microsoft Exchange (including Lotus Sametime to Microsoft Lync porting)

Offered services

Services offered by Exence for mail and communication servers porting projects:

1. Analysis of existing mail and communication servers infrastructure at customer site.
2. Preparation of architecture, sizing and detailed design of future mail and communication servers infrastructure based on Microsoft Exchange and Lync.
3. Project deployment plan preparation including pilot phase.
4. Preparation of migration tools set.
5. Exchange/Lync infrastructure deployment for pilot project (based on test mail accounts).
6. Pilot migration project.
7. Potential architecture tuning based on pilot project's results.
8. Exchange/Lync infrastructure deployment for final project.
9. Mail accounts migration (two phases – first selected set of mail accounts, second the other accounts).
10. Test of migrated infrastructure.
11. Trainings for admins.
12. Preparation of documentation including maintenance procedures and organization of mail infrastructure management.
13. Support and maintenance services.

Best practices

Based on experience of Exence team the following best practices are used in migration projects:

1. Before the production migration project the pilot migration should be conducted.
2. The final migration should be done in two steps. In first step defined number of mail accounts should be migrated. The best group for that selection is an IT department members.
3. The architecture and technical design phase should cover at least:
 - a. Architecture of all components of the mail service;
 - b. Design of high availability services;

- c. Complete and unambiguous definition of configuration parameters for all mail service components;
- d. Internet gateway access configuration of service to enable communication with external services;
- e. Performance and capacity sizing of hardware for the mail service;
- f. Recommended infrastructure capacity increase based on estimated growth;
- g. Permission delegation model for service management to support two levels of control:
 - i. System level management – management of servers, configuration and mail service components;
 - ii. Mail service elements management – i.e. mail accounts set for defined user group;
- h. Permission delegation model must additionally support:
 - i. The possibility of independent management of mail service elements for different user groups by different, recommended separate groups of admins/operators;
 - ii. „Tough” permission separation between different control levels – system management and mail service elements management;
 - iii. „Tough” permission separation between mail service elements that are dedicated for different admin/operators groups;
- i. Design of TMG access rules that will fulfill the following Exchange scenarios:
 - i. Exchange service publication through Outlook Web Access,
 - ii. Exchange Active Sync service publication,
 - iii. Exchange Outlook Anywhere service publication,
 - iv. Publication of other Exchange services (depends upon chosen scenario) i.e. IMAP, POP3,
 - v. Configuration parameters for Microsoft Outlook and Lync clients.

We recommend to use Microsoft migration tools (Microsoft Transport Suite) to avoid additional cost for customer of potential other migration tools (they will not be used any more).

References

Among other projects please find below two references of Exence team:

1. Migration project from Lotus Domino mail server and Lotus Sametime communication server to Microsoft Exchange 2010 and Microsoft Lync for Work Service S.A. Project scope:
 - a. Architecture and design,
 - b. Exchange infrastructure deployment,
 - c. Pilot migration,

- d. First phase of final migration – SMTP support for hybrid model (Lotus and Exchange),
 - e. Final migration – for migration Microsoft Transport Suite tools were used with temporary Exchange 2007 server – no cost of other tools,
 - f. Documentation and procedures,
 - g. Trainings.
2. Migration project from Lotus Domino to Microsoft Exchange 2007 for Vienna Insurance Group in Poland (over 3000 mail accounts). Scope:
- a. Architecture and design,
 - b. Exchange infrastructure deployment,
 - c. Pilot migration,
 - d. First phase of final migration – SMTP support for hybrid model (Lotus and Exchange),
 - e. Final migration – for migration Microsoft Transport Suite tools – no cost of other tools,
 - f. Documentation and procedures,
 - g. Trainings.

Lotus applications porting to Microsoft SharePoint

Offered services

Services offered by Exence for Lotus based application to Microsoft SharePoint porting projects:

1. Analysis of existing Lotus applications (model “as is”).
2. Preparation of recommended application architecture (model “to be”).
3. Preparation of roadmap from “as is” model to “to be” model.
4. Project phases definition (usually based on groups of applications – grouped based on roadmap model and business area that is supported by them).
5. Architecture and technical design including GUI model, Microsoft SharePoint Portal sizing and data migration design.
6. SharePoint based application porting/development according to project roadmap (usually including additional customer requirements).
7. Data migration tools preparation and data migration.
8. Test of migrated applications.
9. User and admin trainings.
10. Preparation of documentation including maintenance procedures and organization of application management.
11. Support, maintenance and future application development services.

Best practices

Based on experience of Exence team the following best practices are used in Lotus apps migration projects:

1. A group of Lotus applications can usually become one application with different user roles. Roadmap is a key element.
2. Usually there are some Lotus apps that are not used and no longer needed – during analytical phase last logins time should be checked.
3. The Lotus applications were usually developed a couple years ago and porting project is quite good opportunity to develop additional functionality in migrated apps. It means that during each application migration some business and system analysis should be done with business users.
4. The user interfaces of Lotus applications and SharePoint applications are quite different. It is a good idea to design GUI of SharePoint apps during design phase and present it to business users.

5. The SharePoint application development can be done in SCRUM model – it allows business users to be involved in the migration project and shape final version of SharePoint apps.
6. The integration with Microsoft Lync can bring additional benefits for users.

References

Among other projects please find below some references of Exence team:

1. The migration of Lotus based application to Microsoft SharePoint for Aesculap Chifa (part of B Braun concern – German company). The applications support public tenders proposal preparation. Project scope:
 - a. Analysis,
 - b. Design,
 - c. Sizing,
 - d. Apps migration,
 - e. Data migration,
 - f. Trainings,
 - g. Support, maintenance and additional development.
2. The migration of Lotus based application to Microsoft SharePoint for an international bank including encrypted graphic data migration. Project scope:
 - a. Analysis,
 - b. Design,
 - c. Sizing,
 - d. Apps migration,
 - e. Data migration (including encrypted images),
 - f. Trainings,
 - g. Support, maintenance and additional development.

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