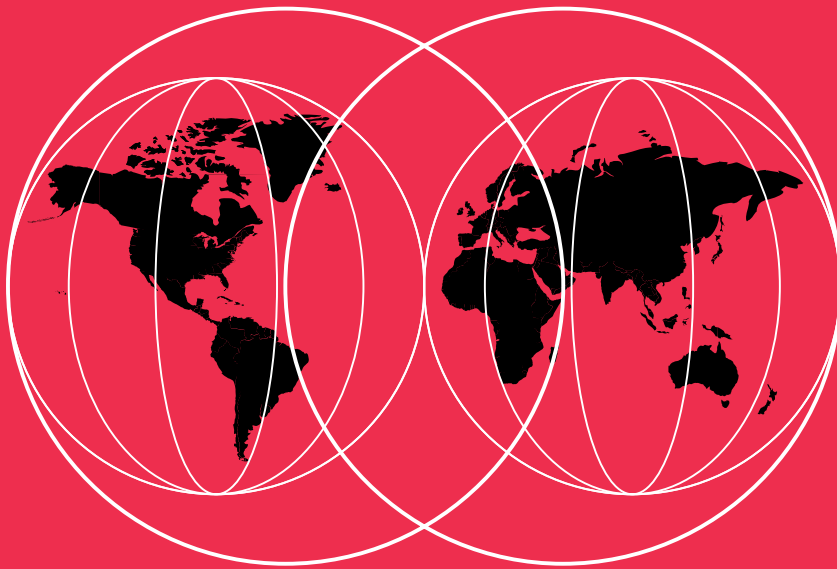


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Eight Steps to a Successful Messaging Migration: A Planning Guide for Migrating to Lotus Notes and Domino

Marion Hawker, Susan Cook, Peter Safeldt



International Technical Support Organization

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SG24-5335-00



International Technical Support Organization

Eight Steps to a Successful Messaging Migration: A Planning Guide for Migrating to Lotus Notes and Domino

February 1999

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First Edition (February 1999)

This edition applies to Release 4.x and 5.x of Lotus Notes and Domino.

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Preface

This redbook describes how to plan for a messaging coexistence and migration project with Lotus Notes and Domino as the target messaging environment. While the information covered in many of the chapters applies to a migration from any source messaging system, either LAN-based or host-based, to Lotus Notes and Domino, some of the chapters focus on planning topics related specifically to a migration from Lotus cc:Mail to Lotus Notes and Domino.

The first chapter gives an overview of the eight steps required to complete a successful migration project and discusses aspects related to the project team, project sponsorship, and the project timeline.

Subsequent chapters discuss each of the migration steps in more detail.

First we present information on why and how to document the business requirements for a coexistence and migration project followed by a chapter explaining what information needs to be documented about the current Lotus cc:Mail environment.

The next chapter emphasizes the importance of developing a training plan which addresses the needs of everyone in the company affected by the migration from the old to the new messaging environment. Then details are given on how to plan, design, and document the new messaging environment, in this case Lotus Notes and Domino, and how to run a pilot project to validate the new environment.

The remaining chapters focus on the development of a coexistence and migration strategy including a discussion of the available coexistence and migration tools as well as on validating that strategy through a pilot project. Once the design of the new messaging environment has been finalized, the push begins to deploy the coexistence and migration strategy across the company.

The final step is to close out the coexistence and migration project.

This redbook makes reference to third-party products. By including them in this document, IBM/Lotus do not solely endorse these products for use in this type of environment. Other third-party products may be available that perform similar or equivalent functions.

The redbook was written for customers, IBM and Lotus business partners, and the IBM and Lotus community, who need a high-level understanding of how to plan for a coexistence and migration project, in particular, a migration from Lotus cc:Mail to Lotus Notes and Domino.

The Team That Wrote This Redbook

This redbook was produced by a team of specialists working at the IBM/Lotus Integration Center in Westlake, Texas, on behalf of the International Technical Support Organization, Cambridge Center, Lotus Development.

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A number of people have provided support and guidance throughout the production of this book. In particular, we would like to thank the following people (in alphabetical order):

- Russ Barnes, IBM/Lotus Integration Center
- Ed Brill, Lotus Development
- Liz Chavez, IBM/Lotus Integration Center
- Feridon Farokhnia, IBM/Lotus Integration Center
- Kristie Fellows, Lotus Development
- Leslie French, Lotus Development

- Jeff Jennings, Lotus Development
- Graphic Services, Lotus Development
- Glenn Matsuda, Lotus Development
- Steve Martensen, Lotus Development
- Leisha Penny, IBM/Lotus Integration Center
- Scott Purdy, IBM/Lotus Integration Center
- Bruce Sattley, Lotus Development
- Dan Steerman, IBM
- Michelle Trapani, Lotus Development

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Chapter 1

Overview of a Successful Migration Project

Your company has recently decided to migrate to Lotus Notes and Domino from your existing e-mail system. The study which led to this migration decision should have also produced a list of business issues and needs which should be addressed by this migration project.

What do you now need to do to ensure the company achieves their business goals and equally important, ensure that the user community views the migration as a positive change which will improve their daily working environment? You need to establish a project and build a project plan with:

- Visible, high-level sponsorship
- Clear, carefully defined objectives
- Detailed, documented planning addressing both the technical and the non-technical issues
- Active project management
- A comprehensive, dedicated project team
- A realistic, achievable timeline

This project plan must address migration as well as coexistence. Coexistence will be that period of time in which both the old environment and the new Lotus Notes and Domino environment are operating concurrently. Not only will you have to deal with users in both environments, but there may well be key applications running in both environments. The project plan must ensure communication continues among people and among applications. The plan must also ensure service levels are maintained.

The steps and activities described in this chapter and the guidelines detailed in subsequent chapters are applicable to migrating from any e-mail environment to Lotus Notes and Domino. Technical examples for the upgrade and coexistence of cc:Mail to Notes and Domino are included.

Eight Steps to a Successful Migration

Listed below are the eight key steps in the planning and successful deployment of any e-mail migration.

- Documenting the business requirements
- Documenting the current messaging environment — Lotus cc:Mail
- Developing the training plan
- Planning, designing, and documenting the new environment — Lotus Notes and Domino
- Piloting the new environment
- Developing a coexistence and migration strategy — Lotus cc:Mail to Lotus Domino
- Piloting the coexistence and migration strategy
- Deploying the coexistence and migration strategy

An overview of each step is given below and each step is thoroughly explained in subsequent chapters of this guide.

Documenting the Business Requirements

The first task the migration project team (the composition of which we will detail later) must tackle is fully documenting the business requirements and scope of the migration. This exercise will involve expanding on those requirements laid out in the messaging evaluation study and detailing any additional requirements. The result of this step is a set of clearly defined, realistic goals for the project.

For details, refer to the chapter that describes how to document the business requirements.

Documenting the Current Messaging Environment — Lotus cc:Mail

In this phase of the project, the project team must document specific, detailed information about the infrastructure, e-mail metrics, applications, and services which comprise the current messaging environment. This information includes such things as the network topology and the current naming scheme. We will cover this in more detail in the chapter documenting the current messaging environment.

Documenting this information will help ensure no functionality, application, or service is overlooked in the new environment. It will also ensure the design of the new environment is one which will support not only the current level of usage but also allow for future growth.

For details, refer to the chapter that describes how to document the current messaging and e-mail environment.

Developing the Training Plan

New skills are required for the new messaging system. Training everyone involved with and affected by this project will be a key factor in its success. Not only do you need to ensure the right people get the necessary technical training to enable them to design, test, deploy, and support the new environment but all those using the new system must be trained on its features and functions and on any applications unique to your company. Communicating the reasons for the migration can be a part of the training.

Training will be an ongoing activity throughout the course of the project. Developing the training plan can actually begin concurrent with documenting the current environment. The plan will then be updated during subsequent steps.

For details, refer to the chapter that describes how to develop the training plan.

Planning, Designing, and Documenting the New Environment — Lotus Notes and Domino

In this step, the project team will be designing the new environment; one which the company plans to rely on and build on for the future. Therefore, the team must design and deploy a well-researched, well-conceived messaging infrastructure which will support not only e-mail but a variety of other messaging applications.

The activities in this step of the project include:

- Planning the new environment
- Designing the new environment
- Documenting the new environment

For details, refer to the chapter that describes how to plan for, design and document the new messaging environment.

Piloting the New Environment

In this phase of the project, the technical design must be validated and the new support infrastructure tested. The new environment must be accepted and all the known problems resolved or documented before beginning the migration of any live users or production data.

This step includes the following activities:

- Testing and change management
- Pilot deployment
- Pilot exit
- Internal marketing

For details, refer to the chapter that describes how to pilot the new messaging environment.

Developing a Coexistence and Migration Strategy — Lotus cc:Mail to Lotus Domino

The coexistence and migration strategies consist of solutions. The solutions help define how to join the old and new messaging systems and describe the framework in which users stop using the old system and begin using the new system.

These strategies are dependent on the business requirements and scope of the migration, the makeup of the old system or systems and the design and implementation of the new Domino and Notes environment. Also note that the training plan and the migration strategy will be highly dependent upon each other.

For details, refer to the chapter that describes how to develop a coexistence and migration strategy.

Piloting the Coexistence and Migration Strategy

In this phase of the project, the coexistence and migration strategies must be validated and the new support infrastructure will continue to be tested.

This step includes the following activities:

- Installing the hardware and software that support the coexistence and migration strategies
- Designing and implementing test plans
- Modifying strategies if necessary

- Pilot deployment
- Pilot exit
- Communication of pilot results

For details, refer to the chapter that describes how to pilot the coexistence and migration strategy.

Deploying the Coexistence and Migration Strategy

At this point you have validated the design of the new environment and the coexistence and migration strategies for your company. Now the push begins to move users from the old environment to the new environment.

Key activities in this step are:

- Training
- Publishing the migration schedule
- Announcing the kickoff of the migration

For details, refer to the chapter that describes how to deploy the coexistence and migration strategy.

The Project Team

Putting together the right project team is another key factor in ensuring a successful migration. You need to make sure you establish a group with the right technical and management skills to ensure an accurate, high-quality design and a realistic, manageable project schedule.

The team will most likely consist of employees from your company along with subject matter experts and consultants from Lotus, IBM, and/or a business partner. While the subject matter experts may participate for only specified periods of time, your consultant will know whom to call and when to call them in.

You must also consider that some up-front training may be required for members of the project team or for those designated as part of the initial support team. Allow sufficient time for this training at the beginning of the project.

You may also wish to expand your project team to include an advisory panel. This panel would be made up of experienced e-mail users from the organizations being affected who can help communicate the progress of the project and assist with choosing appropriate pilot test users. They could also provide early feedback on plans and schedules as well as ensuring any requirements unique to their areas are accounted for in the design of the new environment.

Getting access to the right personnel for the project team and the advisory panel will require buy-in on the project from all levels of management. This issue leads us directly to our next topic: project sponsorship.

Project Sponsorship

The importance of high-level sponsorship must be strongly emphasized for a project such as migration. Not only are you making technical changes to the way the company does business but you also make cultural changes within the corporation. Those cultural changes are much more difficult to 'sell' to the users. For that reason, your sponsor must be someone high enough in the organization to have the power to drive and effect those cultural changes.

Such a sponsor will help emphasize the importance of this project and help ensure the project team gets the cooperation they need from all areas of the company. It is recommended that the project sponsor work with the project leader to hold an initial kickoff meeting for corporate management.

This initial kickoff will gain the needed management cooperation to build the project team and the advisory panel. Further into the process, having the project sponsor acknowledge the work of the test users and participate in the pilot, will foster a positive attitude about the migration throughout the company.

Project Timeline

There is a lot at stake in any coexistence and migration project and as the previous sections have illustrated, there is significant planning, testing, piloting, and training which must occur to ensure a successful migration. Therefore, realistic, achievable time frames must be established for the project.

Establishing realistic time frames might be easily accomplished or you might encounter a sponsor and management team who wants it 'done yesterday'. If the latter is the case, it will be the job of the project leader to:

- Educate management on the steps involved in this type of a project
- Explain the processes involved
- Lay out a reasonable, achievable high-level timeline
- Explain the risks involved in short-circuiting any of the steps or processes

The goal is to gain concurrence from the project sponsor on a realistic achievable timeline.

Summary

A migration project can be complex but successful if you observe the following:

- Follow the eight key planning steps
- Have clear, carefully defined requirements and objectives
- Develop a detailed, working project plan which is actively managed
- Build a strong project team
- Have visible, high-level sponsorship
- Have a realistic, achievable timeline

By ensuring each of the above is part of your migration project you will minimize the risk and be doing all you can to ensure a successful project.

Chapter 2

Documenting the Business Requirements

This chapter describes how and why to document the business requirements for a coexistence and migration project. The following topics are covered:

- Why document the requirements
- The basic requirements
- Beyond the basics

Why Document the Requirements

Corporations around the world are changing on a daily basis, whether due to the purchase or sale of a part of the company or whether simply shifting to keep pace in the challenging, competitive landscape of today's business environment.

The ability to deal quickly with these changes and communicate information about them is one of the key reasons why companies are choosing to improve and expand their messaging infrastructure. Messaging is no longer just the sending and receiving of simple messages and attachments. It can be a whole collaborative environment supporting e-mail, group discussions, team workgroups, corporate intranets, quick publishing to the Internet, and custom applications within a reliable, scalable, secure, integrated framework that is manageable and cost-efficient.

The reasons why your company is choosing to migrate at this time are likely to be among those described above. Documenting these reasons and ensuring the details of each are well understood is one of the first tasks the migration project team must undertake. The project sponsor and the project leader must communicate the reasons and goals of the migration project to the project team. The project team must, in turn, communicate the reasons and goals and other project information to the end-user community. Open communication will facilitate cooperation and help ensure success.

The team must also ensure that the tangible benefits the company expects to derive from the migration are clearly stated and well understood. These benefits might include such things as:

- Improved customer service
- Faster order processing
- Better communications within the corporation
- More timely communications with those outside the corporation

The types of things listed above have a clear value to and effect on the corporation's bottom line. As such, having them as stated goals of the migration project will ensure the project is seen as important throughout all levels of the corporation.

It is key that this project be viewed as high priority and high importance. Clearly defining the business requirements and communicating them to all involved will help ensure this.

During this initial step, factors that will have an impact on the project are identified and documented. These factors include constraints, limitations and issues that must be accounted for by the project. Examples of such factors might include:

- Mandated completion date
- Staffing and resource issues or limitations
- Business need stipulations such as no migrations during end of fiscal periods, for example

The factors that impact the project lead to the definition of the scope of the migration. These factors will also be used in creating the timeline and schedule for the project.

The requirements and scope will be used in all subsequent steps of the project. This first step sets the foundation for the rest of the project.

The Basic Requirements

Many of the basic requirements for migration may have already been presented at a high level in the migration study. However, the team must now expand on those reasons and detail specifics on each to ensure they are incorporated into the design of the new messaging environment.

The basic requirements include such things as:

- Additional client functionality
- Greater messaging server reliability and manageability

- Lower cost of ownership

Note The above refers to the corporation's cost to support and administer the new messaging environment. It does not refer to the costs associated with migrating from the old environment to the new environment.

- Improved interoperability with Internet standards
- Improved throughput

What is expected in each of these areas by your corporation should be detailed in the requirements.

For example if the project sponsor is expecting a specific delivery time for a simple mail message, the project team must ensure that is stated so the designers of the new infrastructure specify the right network topology and systems to meet that goal. Additionally, if it is realized a requirement is unrealistic, now is the time to modify the requirement to within the bounds of what is possible.

Beyond the Basics

After dealing with general requirements, the team must then address the requirements in the areas of:

- The features, functions, and applications which are part of the current environment
- The features, functions, and applications which the corporation wishes to add based on the capabilities of the new environment

The Current Environment

Documenting the requirements for migrating existing functionality should be a very straightforward task. The key is to cover all the bases so no function is overlooked. Users will be more upset by not being able to do something they were used to doing than they will be about learning a new function.

Each existing feature, function, and application should be documented. This list can then be used by the designers to ensure each item is built into the new environment. This list can also be input to the training plan to ensure users know how to perform familiar tasks in the new environment.

The New Environment

Documenting those features, functions, and applications which the company wishes to add to the messaging infrastructure is more complicated.

In the areas of features and functions, the project team will need to document the new ones and ensure they are effectively communicated to the end users. This communication will take place through end-user training and through internal marketing such as quick reference guides.

The area of applications is more involved. The job of the migration team may simply be to build a 'wish list' of those applications that various individuals and groups wish to see incorporated into the new environment. This list would then be turned over to management for further action such as prioritization, project approval, and project funding.

Conversely, specific applications may have already been identified as 'must be available', 'should be available' or 'nice to have available' at the time users begin migrating live to the new environment. In this case, the project migration team must detail the requirements for each of these applications, review the requested priority, approve or modify the priority, schedule the development work, and add this work to the scope of the migration project.

Depending on the number and complexity of these applications, separate work groups may need to be established to complete these applications within the overall time line of the migration project.

It may also be the case that only one or two key applications are deemed important enough to be part of the overall migration project. The other applications would be deemed outside the scope of the migration project and would be handled separately at a later time.

Summary

In this chapter, we covered the importance of documenting the business requirements and scope for a coexistence and migration project. We emphasized the importance of documenting the key basic requirements such as migrating existing features, functions, and applications and improving performance. We also discussed areas beyond the basics focusing on the utilization of new features and functions and the creation of new applications.

Due diligence in both of these areas will ensure that the design of the new environment will meet the corporation's requirements.

Chapter 3

Documenting the Current Messaging Environment

Documenting specific, detailed information about all current messaging systems including any Notes and Domino systems that are already part of your current environment is the foundation which will enable the project team to build a complete and accurate design for the new Lotus Notes/Domino environment.

The guidelines for documenting a cc:Mail environment prior to the upgrade to Notes and Domino will be used throughout this chapter, however, these guidelines are applicable to the migration from any messaging system to Notes/Domino.

In this chapter we will discuss the following topics:

- Documenting the Lotus cc:Mail environment
- Documenting the existing applications
- Documenting the existing services
- Documenting the current support infrastructure
- Analyzing the user community
- Managing risks
- Summary

Documenting the Lotus cc:Mail Environment

Whether you have a small, medium, or large Lotus cc:Mail environment, it is important that you gather all the data recommended here. Having all this information will ensure nothing is overlooked in the design of the new Lotus Notes/Domino environment. Much of this data may already be documented so that this phase of the project may be just verifying the existing documentation.

The activities in this step include:

- Documenting the message stores, the cc:Mail post offices
- Documenting the current messaging network topology
- Documenting the e-mail metrics

- Documenting mail retention policies
- Documenting the current naming conventions
- Documenting the use of Organizer Release 2.x or other calendaring and scheduling systems
- Documenting directory management, control and administration

Documenting the cc:Mail Post Offices

Document the following facts about your cc:Mail post offices:

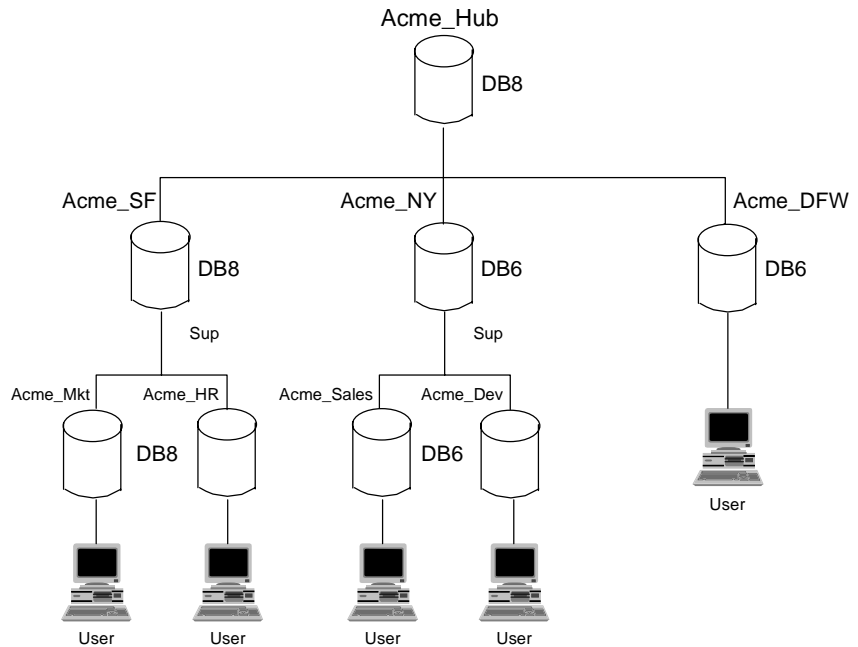
- Post office name and password
- Call password for hub post offices
- All "p" or "P" post office entries listed with their name, cc:Mail address, and ADE (Automatic Directory Exchange) flags
- Version of each post office (DB6 or DB8)
- Version of cc:Mail administrative utilities being used
- Maintenance policies and procedures
- Version of cc:Mail Router being used
- Router configuration; for example, .BAT files and Router parameters for each Router task
- Call lists
- Number of local users
- Operational procedures in place; such as backup/restore and post office recovery
- Administrative procedures in place; for example, how to add and delete users
- Change Management Procedures
- Operating system (Novell, NT Server, OS/2 LAN Server, or others) of each server and the network protocols used
- Path to post office
- Types of modems, if used

Appendix A of this manual provides planning worksheets you can use to document your current cc:Mail environment.

Documenting the Current Messaging Network Topology

The next step is to create a graphical representation of your messaging network showing its mail routing and use of ADE. Your graphic should also include the detailed information which was gathered in the previous activity.

See an example of a messaging network topology below:



Documenting the e-Mail Metrics

In order to ensure the new Lotus Notes/Domino environment can handle the expected number of users and levels of e-mail traffic, you need to have accurate data from the current cc:Mail environment.

You need to document the following related to the number of users:

- Number of local users in each post office
- Number of remote users in each post office who only connect to the post office using cc:Mail Mobile or an Internet client
- Size of each post office
- Public mailing list on the post office

- Bulletin boards on the post office
- Aliases
- Number of messages and bytes stored for each user and in total (both shared and not shared)

It is strongly recommended to document the following related to levels of e-mail traffic, especially in larger organizations:

- Number of messages per day sent and received through the cc:Mail Router during normal business hours
- Number of messages sent and received during peak usage hours
- Average size of messages in bytes sent and received through the cc:Mail Router
- Amount of ADE traffic that flows through the post office
- Number and size of ADE messages sent and received
- Number and size of bulletin board messages sent and received
- Connection types and connection times

Tip Several ways of collecting this information are shown below:

- Post office statistics (“Snapshot”) may be collected by running MSGMGR (DB8) or DIRSTAT (DB6) for each post office. This is highly recommended even for smaller organizations.
- Traffic statistics may be collected by creating Router logs and having the logs analyzed by a custom-made tool.
- The “Wide Area Mail Management” feature of cc:Mail may be deployed. This involves creating a ~WAMM_MAILBOX post office entry in the system and having all the Routers call this entry at regular intervals. The statistics may be collected using either cc:Mail View, a customized tool, or a third-party tool.

Documenting the Current cc:Mail Naming Conventions

Make sure you review and document the naming standards in place for your users and your messaging infrastructure elements. Refer to the section discussing naming conventions in Chapter 7 of this manual.

Documenting Mail Retention Policies

Document the mail retention policies you currently have in place so that you can later implement similar policies in Notes/Domino.

Documenting the Use of Lotus Organizer Release 2.x

If you are using the group scheduling feature of Lotus Organizer in your current environment, you should document its use. In particular:

- Identify the users using Lotus Organizer with cc:Mail
- Identify the location of Organizer files (*.OR2) - file server and path
- Identify the Organizer Scheduling agents in use

Documenting Directory Management, Control and Administration

This involves documenting who can add, change, or delete directory entries. If you have a more complex topology in place, this may involve a number of sites and people.

Later, in Notes/Domino, directory management will be controlled using the Access Control List for the directory.

Documenting the Existing Applications

Any applications which are running based on the current cc:Mail messaging infrastructure and are going to be migrated to the new Notes/Domino environment must be documented in detail to ensure they are migrated accurately. Additionally, any mail-related applications which you are not planning to migrate should be listed including the reasons why they are not being migrated.

Documenting the Current Application Infrastructure

Applications based on the cc:Mail infrastructure typically fall into one of the following categories. These categories are:

- Import/Export applications
- cc:Mail Forms applications
- VIM-based applications

Import/Export Applications

This type of application is based on the cc:Mail Import and Export utilities. These utilities can be used in many ways. One of them is the ability to send and receive mail from an operating system command prompt (DOS, OS/2, Windows), thus facilitating a clean interface from an application to the cc:Mail system.

Examples of Import/Export based applications are:

- Custom-made gateways
- Applications that generate print output or other output, which is then mailed to the recipient by cc:Mail Import
- Intelligent “robots”. For example, one use we have seen was the ability for a cc:Mail user to send a request to the application, which then processed a reply and sent it back to the user. The application was sitting in a loop looking for messages using Export, and then sending the reply back using Import.

Note If you want to migrate Import/Export based applications to Notes/Domino, be aware that there is no equivalent feature available in Notes/Domino. Therefore, you need to reprogram those applications using one of the programming techniques available in Domino, for example, agents, VIM-based or MAPI API-based applications.

cc:Mail Forms Applications

Applications which are created using the cc:Mail Forms tool can route a form through the messaging infrastructure and utilize other services such as database services or transaction services.

cc:Mail Forms applications will have to be reprogrammed if you want to continue using them in the Notes/Domino environment.

Note If you have used the LotusScript language to create cc:Mail Forms applications, those applications are easier to migrate.

cc:Mail Forms applications are messaging-based and can be more easily adapted to the Notes environment. Therefore, they are good candidates for migration.

VIM-Based Applications

Although Notes/Domino supports Vendor Independent Messaging (VIM), cc:Mail VIM applications will need to be modified for use with Notes/Domino. The VIM Developer’s Tool kit contains information on creating VIM-based applications.

Documenting the Applications to Be Migrated

Any application which is scheduled to be migrated to the new Notes/Domino environment must be documented in detail in the coexistence and migration project plan. Each application should then be assigned a priority to determine where it should fall in the migration deployment schedule.

The following information about each application should be documented:

- Description of the application
- Owner of the application
- Users of the application
- Any changes being made to the application as part of the migration
- Impact of the application on daily business operations

Documenting the Applications Not to Be Migrated

If there are any existing applications which will not be migrated to the new environment, they need to be documented as well. For each of these applications, the specific reasons why it is not being migrated should be explained. The reasons might be that they are no longer needed or being replaced by new functionality. This list should then be reviewed by the project team and confirmed with the project sponsor and company management.

Documenting the Existing Services

Services, such as those listed below, are also key elements of the messaging infrastructure and must not be overlooked when planning a migration. Be sure to document how each of these services is used in the existing environment and whether that use will change in the new environment.

- SMTP gateways or other links to the Internet
- Fax services
- Calendaring and scheduling
- Gateways to legacy systems; for example, gateways to a LAN-based or host-based messaging system

Documenting the Current Support Infrastructure

An available, well-trained support infrastructure is very important in the deployment and operation of any messaging environment. This infrastructure includes both system administrators and help desk personnel. The structure and resources of your support environment are likely to depend on the size of your organization.

You should document your existing support infrastructure so the project team can determine whether personnel changes are required and how much retraining and new training the personnel will require.

You should also document the items listed below so they can be reviewed from the perspective of what needs to be changed for the new messaging environment and what needs general improvement. There will also be areas where specific tasks will need to change as well.

- User administration procedures
- Support structure and procedures
- Recovery procedures
- Service Level Agreements

Analyzing the User Community

The human factor of the messaging systems should not be overlooked while examining and documenting the current environment. Understanding the current makeup of the user community will help in all subsequent phases of the project.

Document as much of the following information as is possible and practical:

- Operating system
- Geographic location
- Mobile abilities
- Messaging client(s) use
- Mail-enabled application use
- General job responsibility classification
- Potential as a pilot user
- Potential migration restrictions, for example, accounts who cannot be affected during the end of the fiscal period

Managing Risk

The risk in not performing the activities documented in this chapter is that key features of the existing environment will be overlooked in the planning and design of the new environment. It is much simpler to design all the features in at the beginning than it is to try to retrofit a feature after deployment of the system has begun. The latter will negatively impact the project schedule and the user's perceptions of the viability of the new messaging environment.

The current environment has a dramatic impact on both the coexistence and migration strategies. The information collected during this phase is invaluable in designing the strategies. Also, this process highlights potential problems with the current environments that must be addressed before a successful migration to Notes and Domino can take place.

Summary

In this chapter we have discussed and detailed the information you need to document about your current Lotus cc:Mail messaging environment. For example, you need to document the network topology, the naming standards, the e-mail metrics, the current applications, and the current services and support.

By documenting all these areas, the project team will ensure no features, functions, applications, or services are overlooked in the design of the new Lotus Notes/Domino environment. This phase verifies that the current system can support the users through the coexistence and migration period.

Chapter 4

Developing the Training Plan

Training everyone involved with and affected by the coexistence and migration project will be a key factor in its success. Not only do you need to ensure the right people get the necessary technical training to enable them to design, test, deploy, and support the new environment; but all those using the new system must be trained on its features and functions. They must also be trained on any general applications as well as on any applications unique to your company.

Training will be an ongoing activity throughout the course of the project. Developing the training plan can actually begin concurrently with the documentation of the current environment. The plan will then be updated during subsequent steps of the project.

Depending on the size and scope of your project, you may want to dedicate one or more project team members to training to ensure it receives appropriate attention and focus.

The activities for this step discussed in this chapter include:

- Outlining the training plan
- Writing the training plan
- Executing the training plan
- Evaluating the training
- Managing the risks

Outlining the Training Plan

The first step in preparing the training plan is to list the questions you need to answer about the training requirements for everyone affected by this migration project. These questions will form the outline of your plan. The questions are divided into two general areas: requirements and delivery.

Training Requirements

Here are some questions related to training requirements:

- Who needs training?
- What features and functions must be presented?
- What applications must be presented?
- What services must be presented (fax, Internet, connections to other environments)?

Delivery of the Training

Here are some questions related to the delivery of the training:

- Can standard courses be used or will customization be needed?
- What method of delivery is best for each type of training or group to be trained?
- Should training be held on-site or off-site?
- Should classes be private or public?
- At what point in the project does each type of training need to be delivered?

Writing the Training Plan

The answers to the questions listed above will be the basis for your training plan. Below is a discussion of each of the key questions.

Training Requirements

Who Needs Training?

Everyone affected by this migration project is going to require some type of training. The training may simply be a review of how to use the new Lotus Notes client or it may be in-depth technical training enabling someone to support and maintain the new Lotus Domino environment.

You must address the needs of:

- System administrators
- Help desk personnel (if applicable)
- Test and pilot users
- General users
- Application developers

Another group that must be considered are the company executives. The standard training program may not be appropriate for them and other options, such as one-on-one training, may need to be considered.

What Features and Functions Must Be Presented?

At a minimum the basic features and functions of the new Lotus Notes client must be presented. Also any new features and functions which are key to or an integral part of a general-user application should be presented.

What Applications Must Be Presented?

Any general-use applications should be presented to everyone. Such applications could include a Human Resources system, access to corporate policies, and a problem-reporting system for the new Lotus Notes and Domino environment.

Training on applications designed for a specific department or function can be limited to just those using the application. When this training takes place will depend on whether the application is scheduled to be part of the general roll out of the new environment or whether it will be deployed at a later date.

What Services Must Be Presented

All services which are accessible by the general user should be presented, for example, fax and Internet access. This includes both previously available services and any new services. Especially important is highlighting any differences in accessing or using services which have migrated from the old environment to the new one.

Delivery of the Training

Can Standard Courses Be Used or Will Customization Be Needed?

Standard end-user courses may meet your feature and function training needs. Customization might be required if there are changes to a user's desktop or general working environment which are a result of the migration and need to be presented to enable a user to access the new environment.

Custom training will be required to educate users about the project in general and about the specific migration steps being carried out in your company. It can also help to build enthusiasm for the new Lotus Notes and Domino environment.

Custom training will also be needed for applications built on the messaging infrastructure. How much customization is required will depend on whether the application is fully custom or whether it is a standard application modified for your particular environment. In the latter case there may be existing training materials which require only a minimum of customization.

What Method of Delivery Is Best for Each Type of Training or Group to Be Trained?

There are a wide variety of training options which will address the needs of everyone from system administrators to end-users. You should review all of the available options and determine which options or mix of options will best meet your company's needs.

The primary types of training are:

- Instructor-led training (ILT)
- Technology-based training
- Self-paced training

Instructor-Led Training

There is a full series of instructor-led, hands-on courses which address the needs of system administrators, help desk personnel, and end-users. These courses are available directly from Lotus Education, from a Lotus Authorized Education Center (LAEC), or from IBM. In some cases there may be other vendors who also offer their own courses.

Technology-Based Training

This is an exciting area with new options being developed all the time. One area is online training tools. Such tools are valuable because users do not often retain information from an instructor-led class about a function or feature they do not use on a daily basis. Tools such as Mentor and QuickCards can provide Lotus Notes users with just-in-time, online assistance on features and functions for less cost than a call to the help desk or the cost of a good reference manual.

Mentor for Lotus Notes is a just-in-time, multimedia learning system that delivers audio and visual multimedia instruction across networks to users' workstations when they request it, so they can learn as they work. Developed by VSI Communications Group, Inc., Mentor for Lotus Notes can accelerate a Lotus Notes deployment and increase its success by helping users to quickly understand how to use the full capabilities of Notes in their daily tasks.

QuickCards for Lotus Notes 4.6 is just-in-time training developed by Usability Sciences. QuickCards show how to use more than 135 Lotus Notes features through step by step procedural instructions. QuickCards also include some ScreenCam movies that actually demo the correct steps needed to use the feature. QuickCards stay on top when you need help so you can read the steps and perform them simultaneously without losing the context of the task at hand.

Note Mentor is available for Lotus Domino Release 4.5 and 4.6. QuickCards are available for Lotus Domino Release 4.6. Please check the Education pages of the Lotus web site for further details on both products and on availability of both products for Lotus Domino Release 5.0.

Another technology option is web-based training. Software available today, such as Learning Space and Learning Server, enables instructor-led training to be delivered over the Internet or over a company intranet, creating a virtual classroom. Instructors and students can share live applications and graphics as well as being able to interact real time with one another.

Note Please check the Education pages of the Lotus web site for more information about Learning Space and Learning Server.

Self-Paced Training

There are two types of self-paced training available. The first are traditional, hard-copy training guides which are available for end-user training.

The second type is computer-based training (CBT). There are self-paced CBT modules available which address the needs of end-users, systems administrators and application developers. These modules could be the main source of training for someone not able to attend an instructor-led course or they can provide refresher training after someone has attended an instructor-led course.

Note We recommend you work with a Lotus Education Business Development Manager or other Training Representative to analyze your training requirements, to review the many types of training available, and determine which options or mix of options will best meet your company's requirements.

Should Training Be Held On-site or Off-site?

The key factors in this decision are:

- Do you have the appropriate facility available to offer the training?
- Will the 'interruption' factor be minimal?

The instructor-led courses for end-users, system administrators and application developers are hands-on courses. Therefore, you will need a classroom which can accommodate approximately 12 students each having access to a PC. The classroom will also need presentation systems and support systems for the instructor.

If you do hold classes on-site, you will need to ensure students are given the opportunity to focus their attention on just the training. The need to pull a student from class to handle a problem should be minimized. Not only does this affect the learning of that student but it disrupts the learning for the rest of the class.

Should Classes Be Private or Public?

If you have determined that one or more standard courses are required by your end-users, system administrators and application developers then it may not matter whether they attend a public offering of that course at an outside training center or whether they attend a session offered just for your company. The deciding considerations will then be cost, accessibility, and scheduling.

Naturally any courses which are customized for your company will by design be private courses.

At What Point in the Project Does Each Type of Training Need to Be Delivered?

There are several groups who will need training at different points during the project. A possible breakdown of group, training needed, and when to train is shown below. This is just one possible scenario.

<i>Audience</i>	<i>Type of Training</i>	<i>When — Primary</i>	<i>When — Secondary</i>
System Administrators	Core and Advanced Curriculum & Web Development	Prior to Design	Prior to Migration Pilot
Help Desk Personnel	End-User and Core Curriculum & Help Desk Training	Prior to New Environment Pilot	Prior to Migration Pilot
Testers	End-User Curriculum	After Design	After New Environment Pilot
Pilot Users	End-User Curriculum	Prior to New Environment Pilot	Prior to Migration Pilot
General Users	End-User Curriculum	Begin after completion of New Environment Pilot	Continue through remaining phases till Migration Deployment

In the table above, End-User Curriculum are those courses covering the features and functions of Lotus Notes. There are several courses which address the basics and more advanced features. Core Curriculum refers to first-level systems administration and applications development courses. Advanced Curriculum refers to second-level systems administration and applications development courses. There are also special groups of courses for those working on developing web-based applications as well as for those who will be providing Help Desk support.

Executing the Training Plan

Once you have completed the development and documentation of your training plan, you must begin carrying out that plan by scheduling courses and registering students for those courses.

If you are doing this migration project for a large company, the task of scheduling courses and registering students will be a major one that will span a significant length of time in order for everyone to receive their training. However, you do not want to train anyone too far in advance of deploying the new environment for them. If you do, the student will not retain the new material because they will not have had the opportunity to apply it in a reasonable time frame.

Many organizations achieve success by training the users while the software is being installed on their systems and their old mail is migrated to Notes/Domino. This requires coordination between those who are responsible for training and those who are responsible for the installation and physical migration.

Part of executing the plan will be the creation of a tracking system to ensure that everyone scheduled for training actually receives the training appropriate to their use of the new environment. Student rosters should be created for each class and each student's attendance recorded. Course certificates should also be given to students as they complete a course.

Evaluating the Training Plan

After the first group of students have completed a particular course, the project team members responsible for training should review the course evaluations. If there is any consistent negative feedback or other problems with the course, they should be addressed immediately and the course revised as necessary.

After the students have had the opportunity to apply their training in a 'live' environment, they should be asked to complete a second evaluation to gauge the effectiveness of the course and the relevance of the material covered. These evaluations should be reviewed and any changes made to the course content if needed.

Managing the Risk

Providing every employee affected by the migration with training appropriate to his or her use of the new messaging environment will help ensure their productive use of the new client, applications, and services. It will also help minimize the frustration that change naturally brings about and help the migration to be viewed from a positive perspective by all.

The risk in not providing this training is having large groups of people frustrated with an environment they do not understand and cannot effectively use. If they cannot effectively use a tool which is critical to the day-to-day operations of the business, the company's bottom line will suffer the consequences.

Summary

In this chapter we have discussed the need for developing a thorough training plan which addresses the needs of everyone in the company affected by migrating from the old messaging environment to the new messaging environment. Making sure appropriate training is received by all users will contribute to the success of the project. Ignoring any of these training needs will negatively impact the project and overall company operations.

Chapter 5

Planning, Designing and Documenting the New Environment — Lotus Notes and Domino

In this step, the project team will be designing the new Lotus Notes and Domino environment, one which the company plans to rely on and build upon in the future. Therefore, the project team must design and deploy a well-researched, well-conceived messaging infrastructure which will support not only e-mail but also a variety of other messaging applications.

This chapter will highlight the activities which are involved in planning, designing, and documenting the new messaging environment. We will approach these activities from a project management perspective only in this chapter.

The activities we will discuss are:

- Planning the new Lotus Notes and Domino environment
- Designing the new Lotus Notes and Domino environment
- Documenting the new Lotus Notes and Domino environment
- Establishing the system support organization
- Training the system support personnel
- Installing the new Lotus Notes and Domino environment
- Managing risks

Note If you wish to delve further into deploying a Lotus Notes and Domino environment, the books listed below are sources of in-depth discussion, guidelines, and technical details on that subject.

- *Secrets to Running Lotus Notes: The Decisions No One Tells You How to Make*; IBM/Lotus redbook, IBM order number SG24-4875-00, Lotus part number AA0424
- *Lotus Notes & Domino Network Design*, John Lamb and Peter Lew, McGraw-Hill
- *Lotus Notes Deployment Guide*, which is part of the documentation shipped with the product

Planning the New Lotus Notes and Domino Environment

In a previous chapter we guided you through documenting the current Lotus cc:Mail environment. To plan the new Lotus Notes and Domino environment the project team must review that cc:Mail information and must determine the same specifics for the new Notes and Domino environment.

The list of specifics in terms of infrastructure, e-mail metrics, applications, and services is shown below.

- Network topology
- Naming standards for servers and users
- Need for any new hardware and software
- Number of users
- Expected messaging traffic
 - Note** Be sure to account for expected growth in the above two areas.
- Any site-specific customizations
- Any applications moving from the current environment
- Any new applications
 - Note** Be sure to consider the impact the usage of these applications may have on e-mail traffic.
- Any services moving from the current environment to the new environment (for example, fax access and connectivity to the Internet)
- Any new services
 - Note** Be sure to consider the impact the usage of these services may have on e-mail traffic.
- Support organization which must be expanded and retrained or established

Another area which the project team must consider when planning the new Lotus Notes and Domino environment is the impact migration and coexistence will have on the design. We define coexistence as that period of time when communication and access between the old Lotus cc:Mail environment and the new Lotus Notes and Domino environment is necessary.

The project team must be cognizant of how best to enable this communication. A likely solution is the Lotus cc:Mail MTA. The project team must consider what design changes may be needed to accommodate additional levels of traffic and to reduce excessive hops between servers or geographic locations during the coexistence period.

For more details regarding this important area, refer to the chapter that describes how to develop a coexistence and migration strategy.

Designing the New Lotus Notes and Domino Environment

Now that the project team knows what is needed, they must determine how to deliver it. This will be the design of the new Lotus Notes and Domino environment. The amount of effort spent on planning and designing directly correlates to the success of the implementation.

During the design process, frequent review sessions should be scheduled to keep the project team up-to-date and provide feedback on the developing design. At the completion of the design work, a final review should be held and sign-off on the design received from all project team members and the project sponsor.

Many of the key areas which must be considered when designing the new environment are discussed briefly below.

Determining the Types of Servers Needed

There are several types of servers which you may deploy in your Notes and Domino environment. These include:

- Mail servers
- Database servers
- Billing servers
- Remote service servers
- Passthru servers
- Gateway servers
- Hub servers
- Backup servers

Determining How Many of Each Type of Server

Which types of servers and how many of each you will need depends on the physical topology and the e-mail metrics which have been determined for your messaging environment. Those metrics include the number of users, the levels of e-mail traffic both during normal hours and peak usage hours, the number and types of applications being supported, and the messaging-based services available for the users. You also need to consider such things as geographic locations and balancing of usage loads.

Choosing the Appropriate Platform for Each Type of Server

Lotus Domino servers can run on a variety of platforms, each of which has strengths and weaknesses. You must work closely with knowledgeable technical personnel to choose the appropriate type and size of hardware platform for each type of server in your new environment.

Some of the factors in this area which the project team should consider are:

- Cost — including not only the hardware cost but the total cost of ownership
- Company policy — does a company standard vendor have the right hardware or will you need to go outside standard for the right hardware
- Footprint — how much floor space is available to house the various servers
- Scalability — choose hardware with the view that expansion will most likely be needed in the future
- High availability — review your availability needs and ensure your hardware and/or network topology design will meet these needs
- Disk space — amount required depends on the kind of server and the number of users
- Processor — the more speed, the better for performance
- Memory — amount depends on usage
- Skills — does your support personnel have the necessary skills to work with the platforms you choose
- Protocols — will the chosen platform(s) support the network protocols already in use within your company

Determining Client Hardware Needs

The project team must review the hardware and software requirements for the new Notes client and determine whether users will need upgraded or new systems to enable them to use the new messaging environment.

If upgrades or new systems are needed, the process to acquire the necessary hardware and/or software should begin as soon as possible. The installation of any upgrades or new hardware must then be worked into the overall project timeline.

Determining Security Requirements

The project team must also be concerned with establishing policies and procedures to ensure the protection and integrity of the Lotus Notes and Domino environment. Some of the areas the project team must address are:

- Physical security
- Network security
- Notes security
- Internet security

Note For a very detailed discussion of security in the Lotus Notes and Domino environment, refer to the IBM/Lotus redbook, *The Domino Defense: Security in Lotus Notes and the Internet*, IBM order number SG24-4848-01, Lotus part number 12967.

Choosing the Messaging and Replication Topology

Lotus Domino servers replicate and route in various ways. The goal in choosing the right topology is to minimize the number of hops and thus the amount of replication time, and to simplify maintenance of the Domino Directory.

The most common network topologies are:

- Hub-and-spoke
- Peer-to-peer
- Cluster

Planning for Scalability

In planning for future growth, the project team must not only consider the hardware chosen for each type of server but must also consider the network topology chosen. Certain topologies naturally lend themselves to expansion and are thus the logical choice if any future growth is foreseen.

Incorporating the New Infrastructure into an Existing Infrastructure

If you are running specific protocols within your existing infrastructure, you need to determine what protocols your Domino servers will be running and determine how best to connect servers running different protocols.

Establishing Naming Standards

In a Lotus Notes and Domino environment, naming standards must be established for users, servers, domains, and Notes networks.

Server Naming

Server names may contain up to 79 characters, but be aware that in certain networks a number of the initial characters may have to be unique. It is also recommended you choose names without spaces.

Note We have previously mentioned that the names chosen for Domino servers cannot duplicate those already in use in the cc:Mail environment.

User Naming

There are two types of naming standards for users which can be employed in a Lotus Notes and Domino environment. These are hierarchical naming and flat naming. Each is briefly discussed below.

Hierarchical Naming

Hierarchical naming is the preferred naming system as well as being the default system. In this system a tree structure of organizational units for naming users and servers is established based on the organization of the company. Each organizational unit then has its own certifier. This hierarchical certification allows for flexibility in the naming structure and provides a means to secure communication with other organizations. Organizational names may be up to 64 characters.

Flat Naming

Flat naming is an option to allow for compatibility with earlier releases of Lotus Notes. It is more limited than hierarchical because there is no way to easily identify and differentiate between two users with the same name in an organization. Flat naming also makes it more difficult to securely exchange information with users and servers in other organizations. Although an option, this is not recommended.

Domain Naming

Domain names should be a single word or string up to 31 characters. Periods (.) are reserved characters and should not be used in a domain name.

Notes Network Naming

Notes network names denote groups of servers that are physically connected and use the same network protocol. These names can be up to 31 characters. It is recommended you use an identifier, such as location, as part of a Notes network name.

Setting Up Notes Client Workstations

The project team needs to determine whether or not they want to standardize the setup of users within the company and/or within work groups. The standard Notes user setup files can be customized to meet your project needs.

Administering and Maintaining Lotus Notes and Domino

The project team must establish policies and procedures for administering and maintaining the Lotus Notes and Domino environment. Decisions need to be made regarding these functions such as whether they should be centralized or decentralized.

Backup and Disaster Recovery

The more critical the Lotus Notes and Domino system is to your daily business operations, the more important it will be to ensure that workable backup and disaster recovery plans are in place before the migration of any 'live' users.

Documenting the New Lotus Notes and Domino Environment

Once the design of the Lotus Notes and Domino environment has been finalized, all documentation created as part of the previous activities in this step should be reviewed for completeness. The project team must ensure all areas of the new environment have been documented and can be reviewed by or shared with others involved in the project. This documentation also serves as a point of reference for the future.

Any procedures and guidelines established during the design process that will be part of ongoing administration, maintenance, and support should be placed into an easily referenceable format. A great idea would be a Lotus Notes database.

It is recommended the project team review the final design and all documentation with the project sponsor and corporate management to ensure concurrence and to correct any misunderstandings before moving into the pilot phase.

Establishing the Lotus Notes and Domino Support Organization

The project team must establish a support system which will meet their company's needs. Some of the key areas the team will want to look at are:

- Current support strategy for Lotus cc:Mail including phasing it out
- Total number of Lotus Notes users to be supported and the implications on the staffing issue
- Type of support service to be offered
- How the support service will be provided including electronic, phone and on-site support
- Tools available to help in support including the Knowledge Base and computer-based training programs
- When the support service will be available
- Resources required for support

When reviewing each of these areas be sure to do so from the perspective of all the various support elements. These elements include users, applications development, systems administration, operations, local information technology, and help desk.

Training the System Support Personnel

During this phase, the project team must ensure that personnel who will be involved in the installation, testing, piloting, and initial deployment of the new Lotus Notes and Domino environment are receiving the appropriate system administration and end-user training. Other personnel who will be part of systems support can begin training when this initial group has completed theirs.

For details on choosing the appropriate type of training, developing and customizing course materials, evaluating the training, and ensuring everyone receives the training they need, refer to the chapter that describes how to develop a training plan.

Installing the Lotus Notes and Domino Environment

Once the design has been completed and approved by the project team, the project sponsor, and corporate management, the installation process can begin.

The first step in the installation process is the acquisition of any new hardware needed for either the infrastructure or the users. Such acquisitions usually take considerable time so this process may be begun during the design phase once the hardware requirements have been finalized.

The next step is to begin any other systems or facilities work which is needed to support the new Lotus Notes and Domino infrastructure. This would include preparing space for the new servers, ensuring there is sufficient power and air conditioning in those spaces, and installing new wiring and network connections for the new servers.

Once the hardware is on-site and located properly, installation of operating systems, communications software, and the Lotus Notes and Domino software can begin. After all the components have been installed, the proper functioning of each component should be verified.

If you will be engaging the services of IBM, Lotus, or an IBM/Lotus business partner to assist in any of these activities, be sure to schedule their time well in advance of the date you wish to begin this work.

Managing Risks

The planning and design of the new Lotus Notes and Domino environment is critical to the overall success of the migration project. If the new messaging infrastructure does not meet the company's business requirements and the new e-mail system is not meeting the users' needs, the project will have failed. Taking the time to do a thorough job in this critical step will provide tremendous benefits when the new environment is finally deployed. The reliability of the new environment will be enhanced through clustering and backups. Redundant routing should be employed to ensure message delivery levels.

Summary

This chapter has taken a look at the areas of planning, designing, and documenting the new Lotus Notes and Domino environment from the project management perspective. We have highlighted key areas that the project team must ensure they include in this process as part of doing a detailed, thorough, and accurate job.

Chapter 6

Piloting the New Environment

The activities in this phase of the project must validate the technical design of the new Lotus Notes and Domino environment and validate the new support structure which has been established for that environment. You do not want to begin the general migration of your users until the design of the new Lotus Notes and Domino environment has been validated and all known technical problems have been resolved or documented.

In this chapter we will discuss the following activities of piloting the new environment:

- Testing and change management
- Pilot deployment
- Pilot exit
- Internal marketing
- Managing risk

Testing and Change Management

Testing the design of the new Lotus Notes and Domino environment and exercising the new support structure are very important tasks in the overall coexistence and migration project. You want to ensure everything in the new messaging environment is correct so those developing the migration strategy have a clear, accurate picture of the end goal.

The following activities are part of testing and change management:

- Developing a test plan
- Selecting test users
- Developing test matrices
- Executing the test plan
- Processing results and feedback
- Managing change

Developing a Test Plan

The overall test plan must cover the following topics:

- What needs to be tested?
- Where will the testing take place?
- When will the testing occur?

What Needs to Be Tested?

The following items need to be tested:

- Features and functions — concentrate on those utilized by all users and other functions that are key to daily operations
- Applications which are utilized by all users and applications which are utilized by specific departments or functions
- Other characteristics of the new environment such as performance and scalability

Where Will the Testing Take Place?

Will you be able to set up the new environment at each tester's desk by adding new software and/or hardware or will you need to set up a separate lab environment in which to conduct the testing?

When Will the Testing Occur?

General feature and function testing can probably take place during normal business hours. However, testing of certain applications or services and stress tests may need to be scheduled off-hours. Testers should be made aware of any off-hours requirements before committing to participate in the testing program.

You will also need to let testers know approximately how much of their actual time will be needed for the testing and over what span of time the testing will take place.

Selecting Test Users

You will need to determine if the testers will be members of the project team or whether you will choose a group of experienced e-mail users from throughout the company. For this testing experienced users will be more effective than novice users. Use your analysis of the user community to determine the appropriate composition of the pilot group.

Once the test users have been identified, appropriate end-user and application training must be scheduled for them.

Developing Test Matrices

Concurrently, test matrices must be developed which ensure all areas of the design and support structure are validated and exercised.

The project team must document specific sets of test cases to be performed. Provide the testers with handouts which list:

- Description of each test case to be performed
- An identifier for each test case
- The expected result of each test case
- A place to record the actual result of each test case
- A place to record an incident report number if the test case fails and it needs to be reported to support
- A place to record if the problem has been resolved and how it was resolved
- A place to record results of a re-test

Executing the Test Plan

To begin execution of your plan, hold a kickoff meeting with the test users. Explain the following to them:

- Goals of the testing
- Their roles and responsibilities
- The test matrices and how to use the handouts
- The review process and scheduled meetings
- How to report problems
- The projected timeline for the testing

During the first few days of the testing, have members of the migration project team check with the testers to ensure all is going well. Deal with any issues or problems immediately.

The project team member(s) responsible for testing should keep running track of how each of the testers is progressing through his or her test matrix. This will let the team know quickly whether the originally established timeline is accurate or will need adjustment.

Note Early in the testing, the project team members responsible for training should ask the testers to evaluate the effectiveness of the training they received. Was the right material covered and did they get all the information they needed to enable them to do their testing efficiently? These evaluations must then be reviewed and, if needed, changes made to the training and training materials before the pilot users or the general users start their training.

Processing Results and Feedback

Schedule regular review meetings with the testers. Review their progress in completing the test matrices and discuss all problems they have encountered. Ensure all problems have been reported and are being accurately tracked. When appropriate, have specified test cases repeated to validate changes and ensure those changes have not caused any regression errors.

Managing Change

The iterative process of reviewing and making corrections must be tightly controlled. Therefore, change management procedures must be established and documented as part of this step. You must ensure design changes cause no regression and do indeed resolve the reported problem.

Note In establishing your change management policies and procedures, be sure to include plans for a 'worst case scenario'. Discuss ahead of time what to do if a major problem is encountered during the test phase which is going to seriously impact the overall project.

Pilot Deployment

The pilot deployment will be similar to the test phase. However, you will be working with a larger group of users who represent a mix of various levels of e-mail experience within the company. This group should range from novice users to advanced users.

The pilot users should perform tasks which are part of their daily routine that utilize the standard features and functions of the new messaging system. They should also perform other standard tasks which are done on a regular basis such as monthly reports, quarterly statistics, or corporate broadcast messages. Additionally, they need to exercise any of the standard applications and generally available services which are part of the new messaging environment.

Note This group of users should be identified at the beginning of this phase of the project and scheduled into training classes as soon as an evaluation of the training program has been completed by the initial testers and reviewed by the project team.

The project team should be aware that there may be some aspects of the Lotus Notes and Domino environment they may not be able to pilot at this point. For instance, if your project only calls for the migration of the e-mail client and not applications or services, you would not be able to pilot access to the old applications from the new Lotus Notes client until coexistence had been established. In this case, those features would be part of the coexistence and migration pilot.

At this point all technical issues should be resolved and you will be looking for validation of things such as usability and user-friendliness of both the messaging environment and the new support structure.

However, if problems do occur, all users must be made aware of the proper way of reporting them. The project team must track all reported problems and use the same procedures they did in the testing phase to handle changes and re-testing.

Pilot Exit

A set of criteria for determining pilot completion must be established by the project team. This criteria should include things such as:

- A resolution plan for known problems
- Is any needed documentation complete
- Are any further modifications needed to the training materials
- Has training been scheduled for the general user population
- Are any internal marketing materials ready

After reviewing this criteria, it will be the project team's job to make the decision about whether or not to go forward with the project.

If it is decided that the project is not ready to move forward, the team must decide which step they must go back to and what the impact on the overall project will be. The team must also document the risks if they do not go back.

Then the issues impacting the project should be summarized and an update to the project plan and schedule prepared. This information should be presented to and discussed with the project sponsor and company management to gain concurrence on how best to proceed.

Internal Marketing

The key points for any internal marketing activities are:

- Communication
- Positive reinforcement
- High-level support

Communication

This project is going to affect the daily work of everyone in the company. Therefore, steps should be taken to keep all employees aware of general project activities and to notify them when key events are going to occur for the company or for their specific department or area.

Positive Reinforcement

Direct communication to all employees from the project sponsor and senior management emphasizing the importance of the migration to the company's overall operations and expressing their enthusiasm and encouragement is reinforcement that will provide a very positive focus and help lessen employees' apprehension.

High-Level Support

A tangible show of support for the project is to have the project sponsor and other key management representatives participate in the pilot of the new environment. Not only will their feedback be important in ensuring the project is meeting its goals but publishing their participation and their positive reactions for the new environment will build employees' confidence.

Managing Risks

There may be a tendency for many companies to shorten or bypass this phase of the project. The lack of a thorough and complete testing and pilot phase will expose the project to resistance and problems from the end-users.

If you do not validate the design and work out the problems within the community of the project team and testers, the 'bound-to-occur' problems and potential design flaws will be magnified considerably if found during the large-scale deployment of the new environment.

Most end-users do not like change. But if what they experience is a well-designed, functional, and stable new environment, their acceptance will be faster and less problematic for them, the project team, and the corporation.

Summary

In this chapter we have discussed the key steps in the testing and piloting of the new messaging environment. These are critical steps which, if not done well, will have a tremendous negative impact on the project and on the deployment of the new messaging environment.

Chapter 7

Developing a Coexistence and Migration Strategy — Lotus cc:Mail to Lotus Domino

In order to develop a viable coexistence and migration strategy for your company, the project team must be knowledgeable about a variety of concepts relating to this area and about the various options and tools available for facilitating migration and coexistence.

After a discussion of each of the foundation topics, we will discuss various coexistence and migration strategies, the pros and cons of each, and when each should be used and should not be used.

This chapter will discuss the following topics:

- Defining migration and coexistence
- Selecting a coexistence strategy
- Selecting a migration strategy
- Selecting a migration tool
- Preparing the cc:Mail environment for migration
- Documenting and planning the coexistence and migration strategy
- Managing risks
- Summary

Defining Migration and Coexistence

There are many steps involved in migrating a user from one messaging environment to another. These steps include:

1. Creating a directory entry for the user in the new environment
2. Creating a mailbox for the user in the new environment
3. Installing the new software on the user's workstation
4. Training the user on the new environment
5. Optionally, copying the contents of the user's mailbox from the old environment to the new environment

6. Changing the user's entry in the old environment to point to the new environment
7. Removing the old software from the user's workstation

These activities take place over a period of time. Therefore, you may need to enable communication between the old environment and the new environment. This is what we define as establishing coexistence.

Selecting a Coexistence Strategy

Implementing a coexistence strategy will typically accomplish some, or all, of the following:

- Moving messages between the old cc:Mail and the new Notes/Domino system
- Exchanging directory entries between the two environments
- Synchronizing directory entries between the two environments
- A combination of the above

When selecting a coexistence strategy that suits your environment, you will want to consider the following aspects:

- Do you require mail exchange?
- What is the expected mail traffic load?
- Do you also require directory synchronization?
- How long is the coexistence phase likely to last?

The following sections discuss which coexistence strategies you can choose from. Basically, it is a decision of whether or not to use the Lotus cc:Mail Message Transfer Agent (MTA). Also, it is strongly recommended that you move any SMTP implementation you might have to the Domino SMTP MTA.

You should review each of the strategies discussed below and then evaluate them for your environment based on the guidelines explained in the following sections.

Selecting the cc:Mail MTA versus LMS or SMTP

The following describes aspects related to the Lotus cc:Mail MTA. This section is designed to help you decide whether or not the Lotus cc:Mail MTA is a suitable coexistence tool for you.

Description

One of the decisions you will need to make is whether or not the Lotus cc:Mail Message Transfer Agent is required to handle mail and directory coexistence between your cc:Mail and Notes/Domino environments.

The cc:Mail MTA fully integrates Lotus cc:Mail and Lotus Notes and Domino networks. It delivers high-fidelity interoperability between cc:Mail and Notes, transparently exchanging messages and directory information.

The cc:Mail MTA provides bi-directional message transfer between cc:Mail and Notes users, and offers fully automated directory synchronization between cc:Mail directories and the Domino Directory.

Pros and Cons

The advantage of using the cc:Mail MTA is that it is a native part of the Domino infrastructure. Starting with Release 4.6.3, the MTA is included in the Domino code base.

The cc:Mail MTA provides rich-text support for cc:Mail Release 8.x users and ensures high text fidelity for the previous cc:Mail releases when sending mail back and forth between cc:Mail and Notes/Domino.

Or, you may decide in favor of using the Notes/Domino SMTP function if, for example, your coexistence phase is not likely to last very long, or if the expected mail traffic is not going to be very heavy. Also, this might be a suitable choice if you do not require automatic directory synchronization.

In addition, if you already have the Lotus Messaging Switch (LMS) in place, this may fully satisfy your coexistence requirements.

When to Use and When Not to Use

In general, the cc:Mail MTA will handle a larger mail traffic workload than SMTP. For example, a single MTA should be sufficient for handling up to 30,000 messages or the equivalent of about 10 gigabytes per day.

Selecting a cc:Mail MTA Topology

If you have decided to use the cc:Mail MTA to handle your coexistence requirements, the next step will be to look at the MTA topology required in your environment.

Some Basic Considerations

The cc:Mail MTA can be deployed in several ways. The following criteria should be considered when deciding how to deploy the MTA in your environment.

- Amount of message traffic
- Mail delivery times
- Maximum throughput handled by the MTA and the cc:Mail router

Amount of Message Traffic

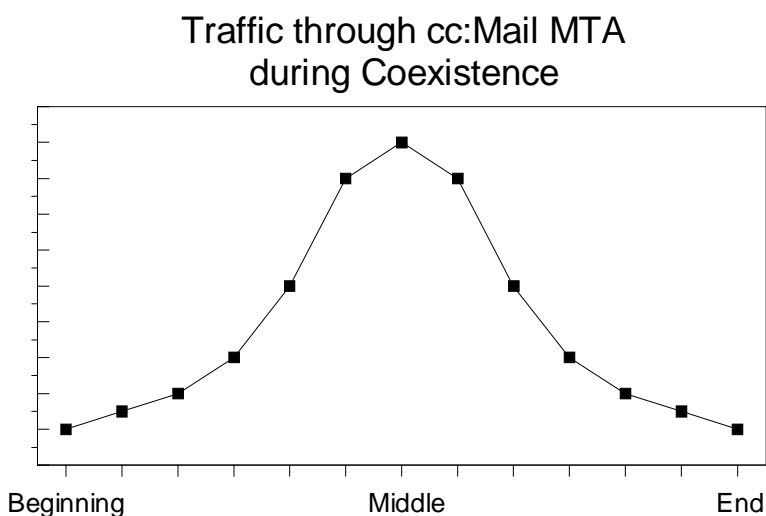
The amount of message traffic during the coexistence phase will probably follow the pattern shown in the figure below.

At the beginning, most of the traffic will be limited to the old Lotus cc:Mail environment.

The traffic will probably peak during the period when the number of users in the old cc:Mail environment roughly equals the number of users in the new Lotus Notes and Domino environment.

The message traffic will decrease as more and more users are migrated to Lotus Notes and Domino.

The following picture shows the amount of message traffic to be expected during the coexistence phase:



Mail Delivery Times

The MTA or MTAs should be deployed so that mail delivery times between the Lotus cc:Mail and Lotus Notes/Domino environments are the same or better as the delivery times within just the cc:Mail environment. You probably want to provide the users with at least the same quality of performance they are used to, if not better.

Maximum Throughput of Each MTA and cc:Mail Router Pair

Based on expected levels of e-mail traffic and expected mail delivery times, the project team must ensure that each MTA and cc:Mail Router pair can efficiently handle the expected mail traffic load. You do not want bottlenecks occurring which will slow down delivery times.

Note You can run several connections between a cc:Mail MTA and a post office by increasing the number of cc:Mail Routers used. This is recommended if you want the MTA to handle up to 30,000 messages per day or the equivalent of 10 gigabytes. If you exceed that number, you will need to add more MTAs to your infrastructure.

Single MTA versus Multiple MTAs

Listed below are several options for deploying the cc:Mail MTA. A discussion of each of them follows. You should choose the one which best fits your company's environment and requirements.

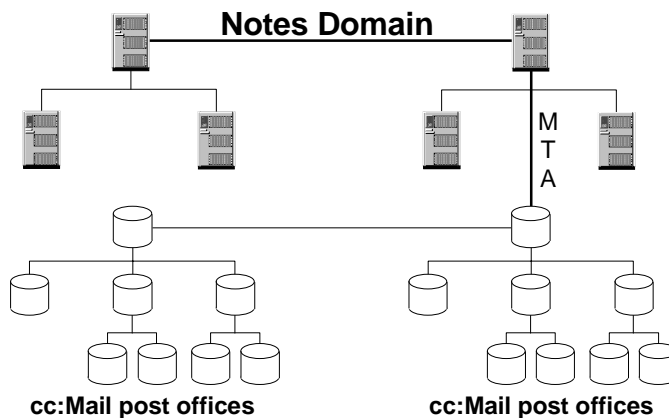
- Single cc:Mail MTA
- Multiple cc:Mail MTAs with Domino backbone
- Multiple cc:Mail MTA with custom backbone

The following sections describe single MTA and multiple MTA configurations and provide tips when to use which topology.

Single cc:Mail MTA — When to Use

This topology is best suited for simpler configurations, for an environment consisting of a main office and local offices, or as the first stage of a topology to be expanded later.

The following picture shows an example of a single cc:Mail MTA topology:



Multiple cc:Mail MTAs with a Domino Backbone — When to Use

This topology builds a new Lotus Notes and Domino environment and connects it to the existing cc:Mail environment. Lotus cc:Mail messages and directory information are then routed between post offices via the Domino backbone. Therefore, this topology is frequently the recommended choice for a migration project.

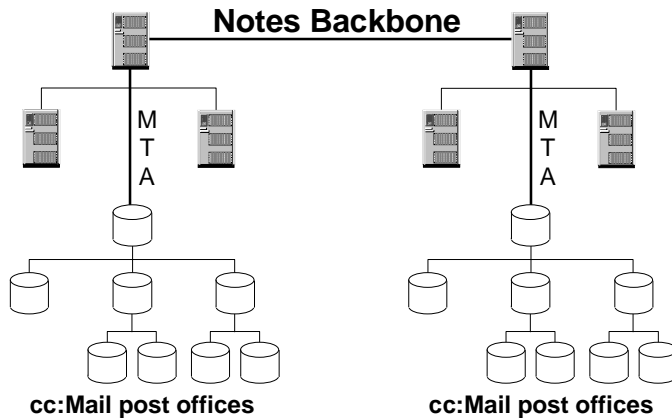
As more and more users are migrated from the old cc:Mail environment, the old cc:Mail infrastructure which had supported them can be disconnected.

However, the Domino environment should consist of only one domain due to a process called tunneling.

Tunneling, or encapsulation, is defined as follows: When a message sent from cc:Mail and bound for cc:Mail is traveling through a Domino backbone, the message content will be encapsulated rather than converted while it is transferred through Domino. The cc:Mail MTA does not need to convert the message from cc:Mail to Domino format and then convert it back from Domino to cc:Mail for its final destination.

Note Tunneling is not possible across Domino mail domain boundaries.

The following picture shows an example of a Notes/Domino backbone topology using multiple MTAs:



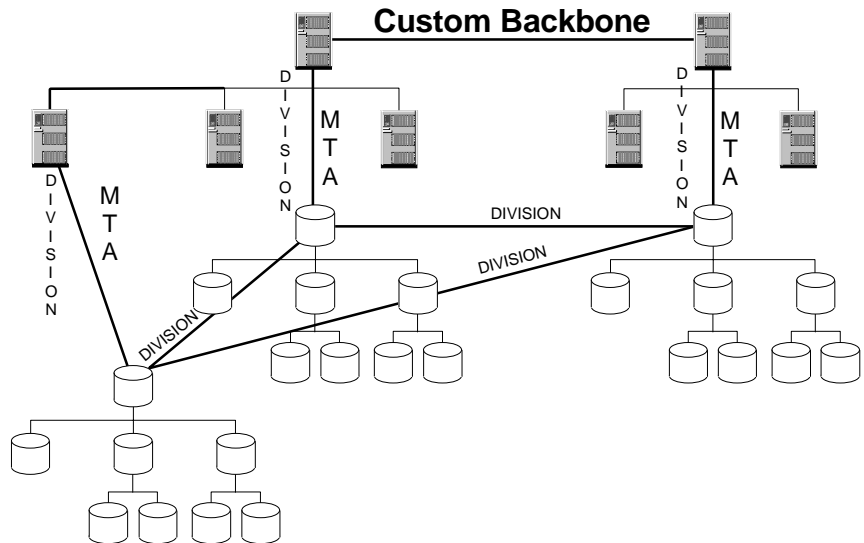
Multiple cc:Mail MTAs with a Custom Backbone — When to Use

This topology enables you to migrate from cc:Mail to Notes and Domino without making any immediate changes to the cc:Mail environment. It allows for a single point of directory administration.

You can use the custom backbone topology as an intermediate step while building the future Notes/Domino infrastructure without making too many changes to the current cc:Mail infrastructure.

This topology may be implemented if expected mail traffic or the current cc:Mail topology dictates it. For example, if there is a lot of mail traffic between cc:Mail sites, you may want to leave this in place for a while rather than route it through a Notes backbone.

The following picture shows an example of a multiple cc:Mail MTA topology with a custom backbone:



Note For more information, refer to the redbook *The Next Step in Messaging: Upgrade Case Studies for Lotus cc:Mail to Lotus Domino and Lotus Notes*, IBM order number SG24-5100, Lotus part number 12992.

Selecting Rip-and-Replace with Some Coexistence

In general, Rip-and-Replace refers to a specific migration strategy where none of the user's data are retained.

However, some Rip-and-Replace projects may stage the cutover of users by department or division. In this type of an implementation, there will be a need for coexistence between the cc:Mail and Notes/Domino environments. The cc:Mail MTA, SMTP or X.400 may be used to facilitate this coexistence.

Calendaring Coexistence between Organizer 2.x and Notes/Domino

You can use the following tools included with the Organizer 97 GS code to provide coexistence between Organizer 2.x calendaring and the calendaring and scheduling features of Notes/Domino:

- The Free-Time Plug-in allows a Notes calendaring user to view the available time of an Organizer 2.x user. There is no capability for an Organizer 2.x user to view the free time of a Notes user.
- The cc:Mail MTA Conversion DLLs work in conjunction with the cc:Mail MTA to exchange meeting notices between Notes calendaring users who use either the Notes or Organizer 97 GS interface and cc:Mail users with Organizer 2.x.

For more information, refer to the redbook *The Next Step in Messaging: Upgrade Case Studies for Lotus cc:Mail to Lotus Domino and Lotus Notes*, IBM order number SG24-5100, Lotus part number 12992.

Moving SMTP to the Domino SMTP MTA

It is strongly recommended that you move any SMTP implementation you might have, for example, the cc:Mail SMTPLink, to the Domino SMTP MTA as early as possible in your migration project.

For example, a Notes user sending an e-mail to an Internet user via cc:Mail SMTPLink would use the following addressing format:

```
safeldt@dk.ibm.com AT <Internet mail post office name> @ <foreign cc:Mail domain name>
```

However, if you are using the Domino SMTP MTA, you can use “business card” type of addressing, as in:

```
safeldt@dk.ibm.com
```

If you delay moving your SMTP implementation, the Notes users will need to change the way they are addressing SMTP mail later once the SMTP function has been moved to the Domino SMTP MTA. Therefore, it is better to move SMTP very early in the general migration process.

If you perform the following steps, the change can be carried out without interfering with the way your cc:Mail users are addressing SMTP mail. At the same time, this also allows Notes/Domino users access to SMTP mail.

The procedure for moving SMTP to Notes/Domino is as follows:

1. Establish coexistence between cc:Mail and Notes/Domino by connecting the two environments through the cc:Mail MTA.
2. Synchronize all the directory entries for users between cc:Mail and Domino.

3. Install and configure the Domino SMTP MTA.
4. Configure all the users' e-mail addresses in the person documents by specifying the appropriate information in the Short Name field (for Domino Release 4.x) or the Internet Address field (for Domino Release 5.x).
5. Test the Domino SMTP MTA by sending several test e-mail messages from Notes/Domino to the Internet.

At this stage in the process, your Notes users can send Internet e-mail messages through the Domino SMTP MTA; however, they will still need to receive Internet e-mail messages through cc:Mail SMTPLink.

To enable receiving Internet e-mail using the Domino SMTP MTA, the following steps need to be performed:

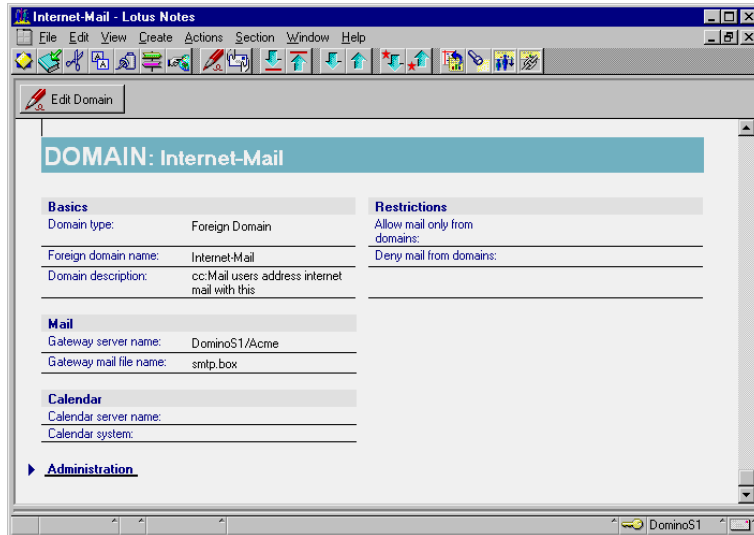
6. Redirect incoming e-mail to the SMTP MTA by changing the DNS registration and/or the firewall configuration.
7. Change the address of the Internet mail post office in cc:Mail to point to the Domino domain, and allow this change to propagate to other cc:Mail post offices. In the following example, the Domino domain name is ACME, and the Internet mail post office name is Internet-Mail:

The screenshot shows a dialog box titled "Edit Directory Entry" with the following fields and values:

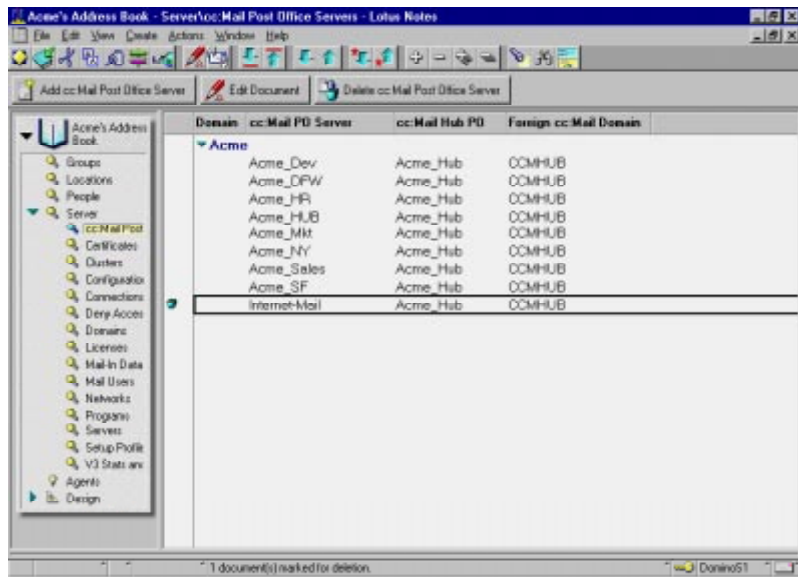
- Name:** Internet-Mail
- Address:** ACME
- Comment:** cc:Mail users address internet mail with this
- Propagation Type:** Default
- Universal Names:**
 - Friendly Name: (empty)
 - Alternate Name: (empty)
 - Additional Comments: (empty)

Buttons for "OK" and "Cancel" are visible on the right side of the dialog.

- In the Domino directory, add a foreign domain document with the same name as the cc:Mail Internet e-mail post office. In the following example, the cc:Mail Internet e-mail post office name shown in the Foreign domain name field is Internet-Mail, and the name of the Domino server running the SMTP MTA is DominoS1/Acme. The document points to SMTP.BOX as the gateway mail file name on server DominoS1/ACME.



- In the Domino directory, go to the cc:Mail Post Office Servers view and delete the cc:Mail post office entry pointing to the cc:Mail Internet mail post office. In the following example, this post office has the name Internet-Mail:



Tip If you experience problems with cc:Mail MTA routing, shut down and restart the Domino server running the cc:Mail MTA. This ensures that the cc:Mail MTA knows about the new routing information defined for the cc:Mail post offices in the Domino directory.

Now Internet mail, both sent and received, should be routed through the Domino SMTP MTA.

Selecting a Migration Strategy

There are several basic migration strategies you can choose from:

- No data migration (“Rip-and-Replace”)
- Partial data migration
- Full data migration
- Using the cc:Mail Release 6.3 client
- A combination of the above

For each of these strategies we will:

- Describe the strategy
- Discuss its pros and cons
- Discuss when to use and when not to use

You should review each of the strategies discussed below and then evaluate them for your environment based on the guidelines explained in the following sections.

Selecting to Migrate No Data

The following describes the migration strategy that involves no migration of data, also called the Rip-and-Replace method.

Description

This strategy involves the following:

- Implementing the new Lotus Notes/Domino infrastructure
- Installing the new Lotus Notes/Domino system
- Running the old cc:Mail environment in parallel with the new Lotus Notes/Domino environment for a period of time
- After the Lotus Notes/Domino environment is ready, cutting users over 'cold' from cc:Mail to Notes/Domino
- Coexistence must be established unless all users will be moved at the same time.

Pros and Cons

This is the easiest migration method as it requires no actual migration of data. However, few organizations within a company can tolerate this method, which can take the form of the users printing anything they wish to keep, or of cc:Mail still up and running with no mail routing taking place. The user may have access to both the old cc:Mail system and the new Notes/Domino system for a period of time after which access to the cc:Mail post office is terminated.

When to Use and When Not to Use

The Rip-and-Replace strategy is typically best used when:

- Working with smaller environments (less than 100 users)
- The time frame should be kept as short as possible
- There is no need to move mailbox data from the old environment to the new environment

The Rip-and-Replace strategy should typically not be used when:

- Working with a larger environment (more than 100 users)
- There is a need to move mailbox data from the old environment to the new environment

Selecting to Migrate Some Data

The following describes the migration strategy that involves a partial migration of data.

Description

The users that are moved to Notes/Domino with this option have some but not all their data brought over.

Pros and Cons

The advantage to this method is the reduction in the amount of data that must be converted.

The downside is the amount of planning that must be done to successfully implement the partial migration. This method requires a good understanding of how each organization within the company uses cc:Mail because the information that is migrated must be the information that the organization relies on. For example, if the organization keeps mission-critical information in a cc:Mail bulletin board, then the migration plan for that organization must include bulletin boards.

When to Use and When Not to Use

Use the partial migration strategy if you do not require for all the cc:Mail data to be migrated to Notes/Domino and if you can take the time to thoroughly plan which data to migrate.

Do not use this migration strategy if there is a need to migrate all the cc:Mail data to Notes/Domino.

Selecting to Migrate All the Data

The following describes the migration strategy that involves a full migration of cc:Mail to Notes/Domino.

Description

This method pushes all the information contained in the cc:Mail mailbox into the Domino data store. This is typically done using a step-by-step migration method, particularly in larger organizations.

The step-by-step strategy has the following characteristics:

- The duration of the migration project can be as long as you require.
- End-user training and migration of individual users may be scheduled as needed.
- You will have time to move the contents of users' mailboxes to the new environment.

Pros and Cons

The advantage for the users is that they will be able to retain all their data.

On the other hand, this method may require some time since all the data contained in cc:Mail will be brought into Notes/Domino.

When to Use and When Not to Use

You would typically use the full-data migration if there is a requirement for all the cc:Mail data to be migrated to Notes/Domino.

Using the Lotus cc:Mail Release 6.3 Client

The following describes the migration strategy that involves using the Lotus cc:Mail Release 6.3 client.

Description

The Lotus cc:Mail Release 6.3 client has several features which can facilitate your migration project. This client can be used in step-by-step migration projects.

Lotus cc:Mail Release 6.3 is a 16-bit Windows client that provides access to both cc:Mail post offices (DB6/DB8) and Lotus Domino Release 4.5 or later mail databases. Use this client and the cc:Mail to Notes Migration Tool to upgrade your cc:Mail users to a Domino server back-end without disrupting daily e-mail activities.

cc:Mail Release 6.3 supports a step-wise upgrade from cc:Mail to Lotus Notes. With this approach, you can take your time upgrading cc:Mail users to Notes mail clients and upgrading post offices to Domino servers.

For both the DB6 and DB8 versions of the post offices, you may take advantage of cc:Mail SmartUpgrade to upgrade your clients with a minimum of effort. See the section about cc:Mail SmartUpgrade in this chapter.

Note cc:Mail Release 6.3 does not support mobile users. It is recommended to upgrade mobile users to Notes mail quickly to take advantage of its enhanced mobile features. Also, cc:Mail Release 6.3 users must be upgraded by the cc:Mail to Notes Migration Tool to work properly in the Notes/Domino environment.

Caution The cc:Mail Release 6.3 client is not supported on a Domino Release 5 server. At the point of writing this manual, an update to the current Release 6.3 client was planned to support a Domino Release 5 server.

Pros and Cons

Using the cc:Mail Release 6.3 client requires only minimal effort on the users' workstation as the back end can be automatically changed from a cc:Mail post office to a Domino server without touching the users' workstations.

Also, you can gradually deploy your Notes/Domino infrastructure without an immediate need to retrain your users. They can continue to work in a cc:Mail type of interface environment. By and by, you can migrate the Release 6.3 clients to Notes clients and train your users as required.

When to Use and When Not to Use

You should use the cc:Mail Release 6.3 client if your Notes client infrastructure is not quite in place yet and you may want to take some more time or require additional budget to train your users.

Even if your Domino infrastructure is in place, it may not be possible for you to upgrade the workstation hardware for Notes right away. The Release 6.3 client allows you to maintain your migration schedule for the message store and then address the workstations at a more appropriate time in the future.

On the other hand, if you have a requirement for using Notes/Domino applications at an early stage in the migration process, you may want to consider migrating to Notes clients as the Release 6.3 client only supports messaging functions.

Selecting a Combination of Migration Methods

There are organizations that may require a combination of the different migration methods.

For example, you may choose to perform a full-data migration for some of your groups, but migrate no data for other groups, or only some of the data.

Who Performs the Migration?

Another important aspect to consider is which group will actually perform the migration of cc:Mail data to Notes/Domino.

Are you planning for your end users to migrate their data, or is this a task you will delegate to your administrators?

Are you considering to involve a third-party vendor who has experience with performing similar migration projects?

The decision you make will have an impact on your planning requirements in terms of cost and timing.

Selecting a Migration Tool

The following sections discuss the tools currently available to facilitate your migration from Lotus cc:Mail to Lotus Notes/Domino Release 4.x.

Note You can download the following migration tools from the Lotus Web site www.lotus.com/migration:

- cc:Mail (DB6) to Notes Upgrade Tool
- cc:Mail (DB8) to Notes Upgrade Tool

Lotus cc:Mail to Lotus Notes Migration Tool — The Admin Tool

This tool is a Lotus Notes application which requires a Notes administrator workstation and/or a Domino server. The tool can be deployed with or without the cc:Mail MTA or the Lotus Messaging Exchange Facility (LMEF) coexistence tool.

The Admin Tool comes in two versions; one for DB6 post offices, and one for DB8 post offices. Both are applicable to Notes Release 4.x environments. It is typically run by the administrator and involves the three-step process described below:

1. Directory conversion which handles user certification and directory changes. The user is registered as a Notes user and a person document is created.
2. Mailbox conversion which handles copying mailbox contents to the new environment
3. Archive conversion which handles copying cc:Mail archives to the new environment.

Note The administrator needs the appropriate access in order to migrate the user's archives.

The tool can be run in two ways:

- Using the "Migrate Now" button in the migration configuration database
- As a server task

Note For more information, refer to the redbook *The Next Step in Messaging: Upgrade Case Studies for Lotus cc:Mail to Lotus Domino and Lotus Notes*, IBM order number SG24-5100, Lotus part number 12992.

Lotus cc:Mail to Lotus Notes Migration Tool — The User Tool

The User Tool is typically used to migrate components stored on the users' workstation, like:

- Mail for mobile users
- Archives and private addresses (privdir.ini)

The administrator usually does not have access to that data.

This tool comes in two versions; one for DB6 post offices, and one for DB8 post offices. Both are applicable to Notes Release 4.x environments.

Each user can optionally install and run the user tool on their workstations or the administrator can run the tool for the users from their workstations.

Following is a list of prerequisites before the user can use the migration tool:

- Lotus Notes must be installed on the user's workstation.
- The user must have been migrated to Notes/Domino using the admin-based migration tool, or the user must be a registered Notes user, as described in the previous section.
- The user must have a local replica of the Notes mail file on their workstation.

Lotus cc:Mail to Lotus Notes Migration Tool for Lotus cc:Mail 6.3 Client

The Lotus cc:Mail to Notes Migration Tool has special support for cc:Mail Release 6.3 clients.

Note You can download the following migration tools from the Lotus Web site www.lotus.com/migration:

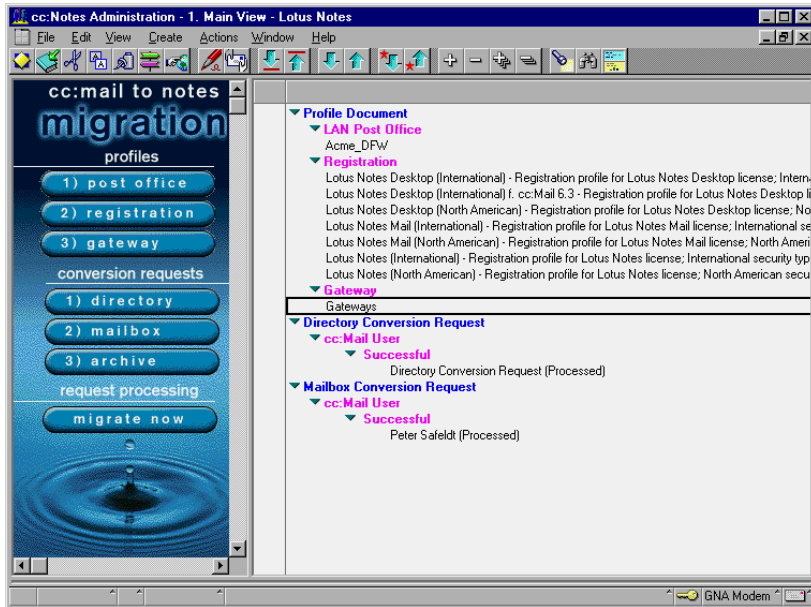
- cc:Mail (DB6) to Notes Upgrade Tool
- cc:Mail (DB8) to Notes Upgrade Tool

The following sections describe how to connect a cc:Mail Release 6.3 client to a Domino server and how to migrate data stored on the user's workstation.

Connecting a cc:Mail Release 6.3 Client to a Domino Server

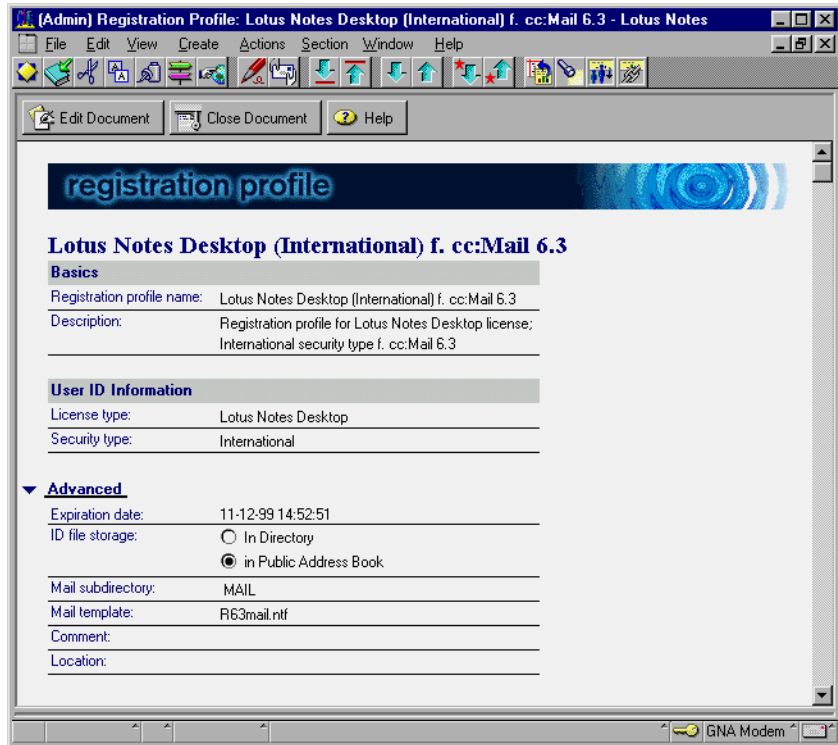
The following steps are performed by an administrator. Complete these steps to allow cc:Mail 6.3 users to connect to a Domino server:

1. Install the cc:Mail to Notes Migration Tool and create the cc:Notes Administration database from the template provided by the tool.
2. Open the cc:Notes Administration database. It looks like this:



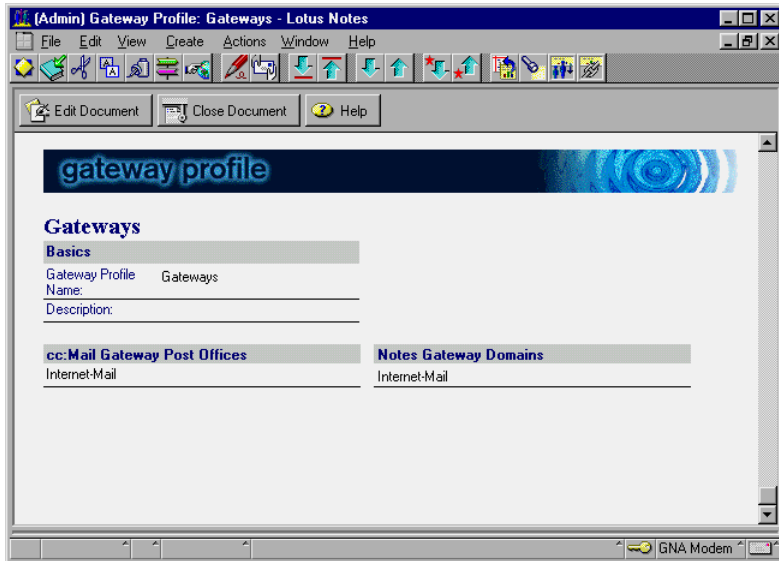
3. Create a Registration Profile document and specify the R63MAIL.NTF mail template in the Mail template field. This template is distributed and installed with the migration tool.

It looks like this:



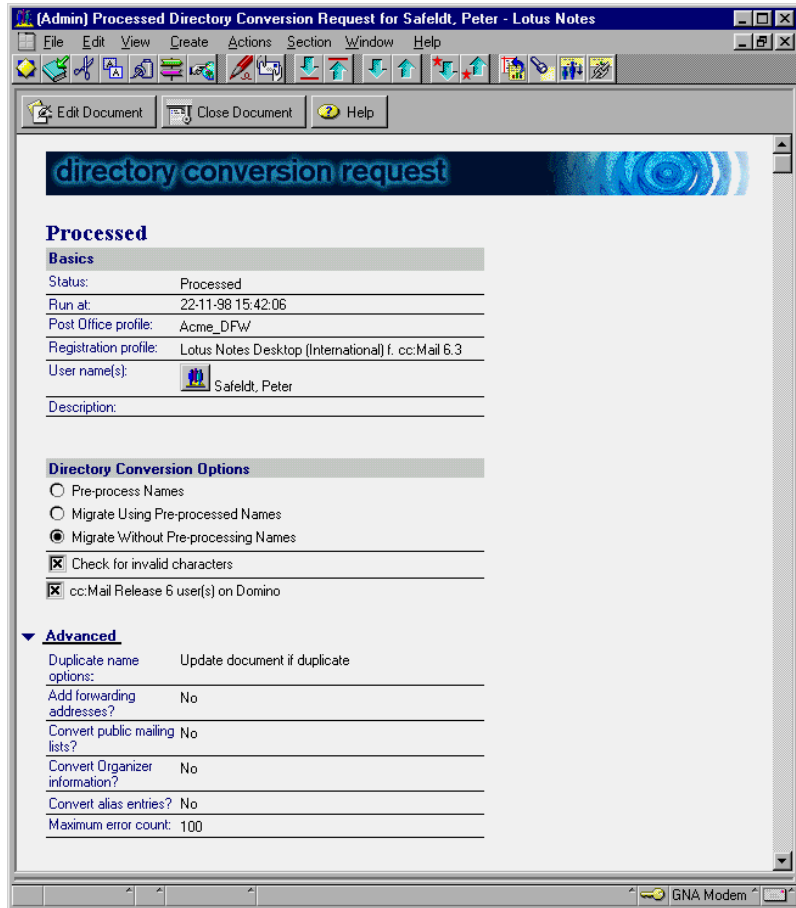
4. Create a Gateway Profile document and specify the SMTP and any other gateways in use. Otherwise, these services will not be available to migrated users running against the Domino server.

A completed Gateway Profile document could look like this:



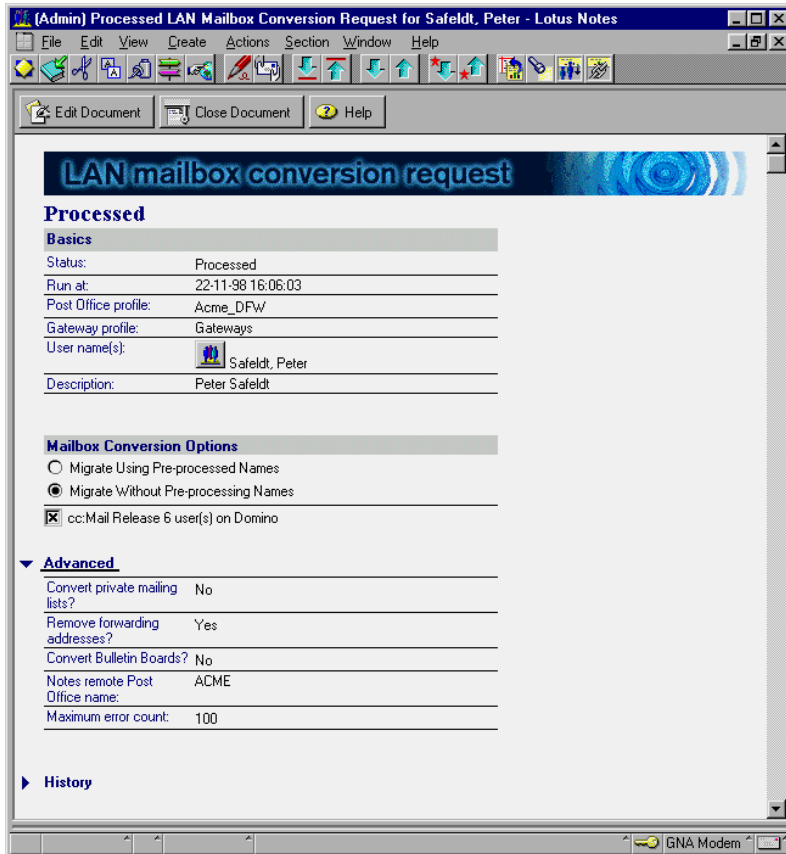
5. Create a Directory Conversion Request document and check the checkbox called cc:Mail Release 6 user(s) on Domino.

It looks like this:



6. Create a LAN Mailbox Conversion Request document and check the checkbox called cc:Mail Release 6 user(s) on Domino.

It looks like this:



During directory migration, the migration tool creates a file called NOTES.USR in each cc:Mail post office directory (\CCDATA) that you migrate.

The migration tool adds one line in the [Notes User] section of this file for each user that you migrate. Following is an example of the information contained in that line:

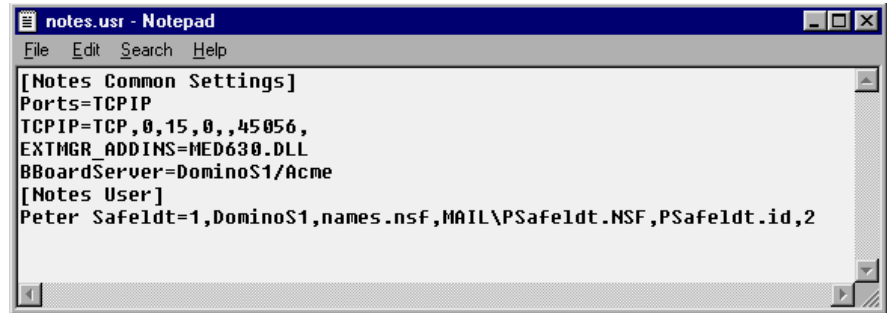
John Valentine=1,test_server,names.nsf,mail2\jvalenti.nsf,jvalenti.id

where:

- John Valentine is the name of the user that was migrated
- 1 indicates the migration status, in this case showing that the migration is complete; a status of 0 would indicate that the migration is in process
- test_server refers to the Domino server name

- names.nsf refers to the Domino directory
- mail2\jvalenti.nsf refers to the user's mail file including the path
- jvalenti.id refers to the user's Notes ID file

Here is a sample NOTES.USR file showing both the Notes Common Settings section and the Notes User section:



```

notes.usr - Notepad
File Edit Search Help
[Notes Common Settings]
Ports=TCPIP
TCP/IP=TCP,0,15,0,,45056,
EXTMGR_ADDINS=MED630.DLL
BBoardServer=DominoS1/Acme
[Notes User]
Peter Safe1dt=1,DominoS1,names.nsf,MAIL\PSafe1dt.NSF,PSafe1dt.id,2
  
```

Once the user is connected to the Domino server, they can continue to use the cc:Mail Release 6.3 client without being aware that the back end is now a Domino server and no longer a cc:Mail post office.

Using the Lotus cc:Mail Upgrade Wizard

The Lotus cc:Mail Upgrade wizard migrates the components which are stored on the user's workstation after the user has been upgraded to the Lotus cc:Mail Release 6.3 client and is running that client against a Domino Server.

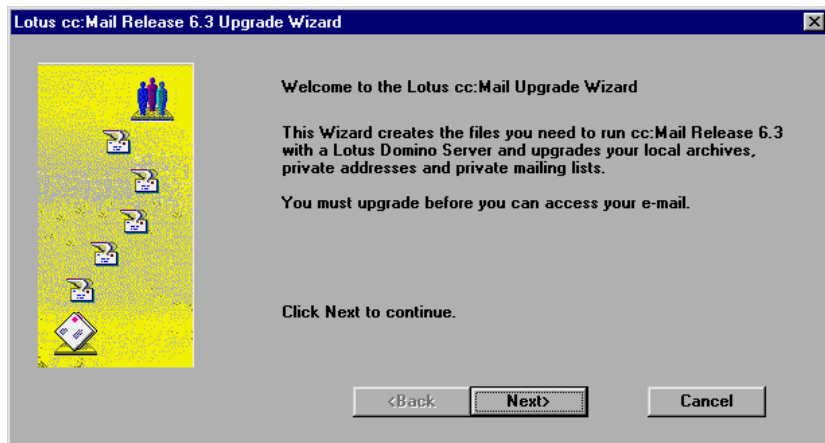
The following components are migrated:

- Archives
- Private addresses (privdir.ini)
- Mailing lists

After the migration tool has been run, the cc:Mail Upgrade wizard runs automatically when the user first starts the cc:Mail Release 6.3 client.

Caution Edit the settings in the NOTES.USR file (see previous section) before the users, now migrated to Domino, log into cc:Mail Release 6.3. If a user runs the Upgrade wizard before you make any necessary editing changes to NOTES.USR in the post office directory, the changes will not be rolled out to that user.

After the user has been migrated to a Domino back end, that user is presented with the following message when first logging into cc:Mail Release 6.3:



Clicking the Next button will complete the upgrade process. The user can then continue using the cc:Mail Release 6.3 client.

Migrating Organizer 2.x Calendaring Information

You can choose from two possible strategies when migrating from cc:Mail and Organizer 2.x to Notes/Domino Release 4.5 or 4.6 calendaring and scheduling.

One option is to upgrade cc:Mail to Notes for mail only while leaving Organizer 2.x in place for calendar. This option has many limitations. In particular, Organizer 2.x is not supported with a release of Notes higher than 4.13, and coexistence requires a 16-bit Notes client.

The other option is to do the calendar upgrade concurrently with the mail upgrade. The Lotus calendar migration tool ships with the Organizer 97 GS product. It is designed for users who plan to use Organizer 97 GS as a front end to the Notes calendar. However, the tool can also be used to migrate data for users who will use the Notes calendar interface.

Between the time users are registered for Notes and their migration from cc:Mail/Organizer 2.x is complete, users may have mail and/or calendar in more than one location. To ensure that calendar works correctly and consistently, it is recommended that mail and calendar upgrades are completed as close together as possible.

The Organizer 97 GS migration tool can be run by the administrator to do bulk migration, or the users can migrate their own data.

Note The migration utility will populate the Notes mail file with both the migrated Organizer 2.x data and with a number of Notes documents and views needed by Organizer 97 GS. If the user chooses not to use Organizer 97 GS, it is desirable to remove this information.

For more information, refer to the redbook *The Next Step in Messaging: Upgrade Case Studies for Lotus cc:Mail to Lotus Domino and Lotus Notes*, IBM order number SG24-5100, Lotus part number 12992.

Using Domino Upgrade Services for cc:Mail and Organizer

In Notes/Domino Release 5, the cc:Mail to Notes Migration tool is distributed as part of Domino Administrator. The upgrade functionality is now provided by the so-called Domino Upgrade Services (DUS).

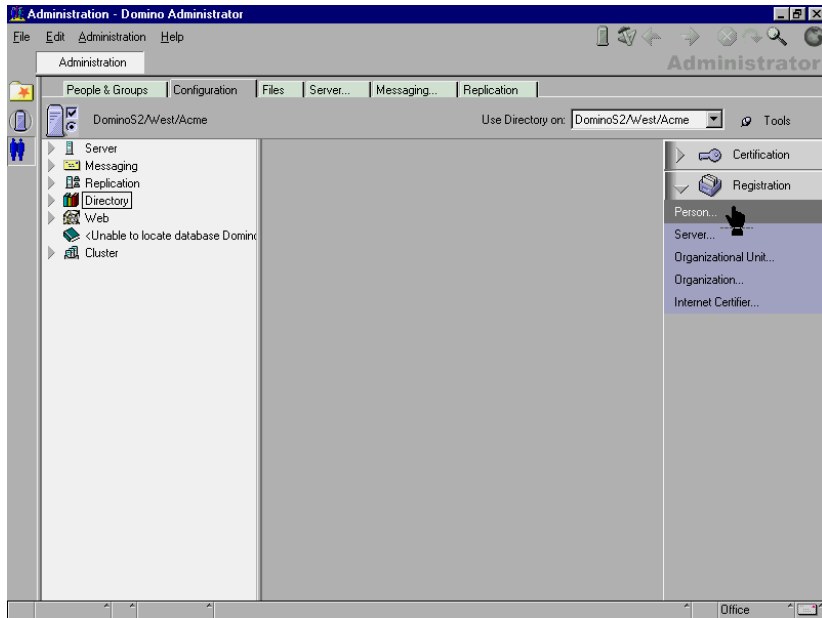
Note Domino Upgrade Services also enables the migration of users from other LAN-based messaging environments to Domino Release 5, for example, Microsoft Mail, Microsoft Exchange, and Novell GroupWise.

This tool replaces the previous cc:Mail to Notes Migration Tools for DB6-based and DB8-based post offices in the Release 5 environment.

Note Make sure that you select the Migration Tools option when installing Domino Administrator. Also, please note that we were using a Beta version of Domino Release 5 at the point of writing this redbook. Some of the features described here may change once the official version of the product is available.

To migrate cc:Mail users and their data, including Organizer 2.x data if applicable, to Domino Release 5, follow these steps:

1. On the People and Groups tab in Domino Administrator, click the Registration Tool. The following dialog box is displayed:



2. Under Registration, click Person. The Register Person dialog box is displayed:

Register Person -- New Entry

Advanced

Registration Server: DominoS2/West/Acme

First name: M: Last name: Short name:

Password: Password quality scale: 0 - Password optional Set internet password

The Internet address below is created using the person's name (above) and the internet address components (right). You can also edit the internet address directly. It must be unique in the address book.

Internet Domain: sl.dfw.ibm.com

Address name format: FirstName LastName

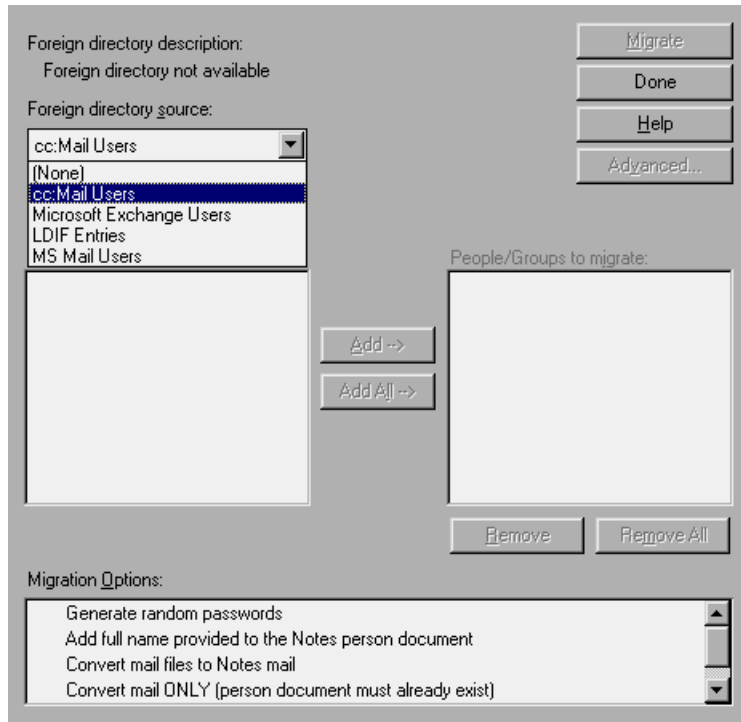
Internet address: Separator: None

Registration status: Add person Import Text file... Migrate people...

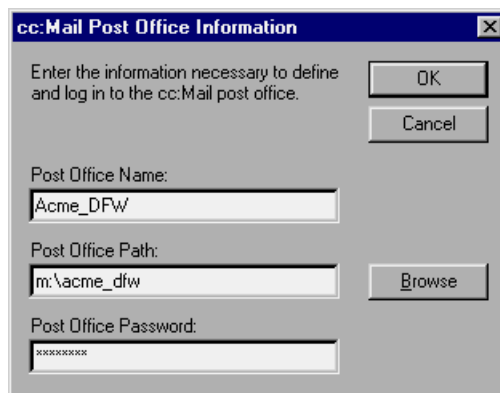
User Name	Registration Status	Date
-----------	---------------------	------

Register All Register Delete Options... Done Help

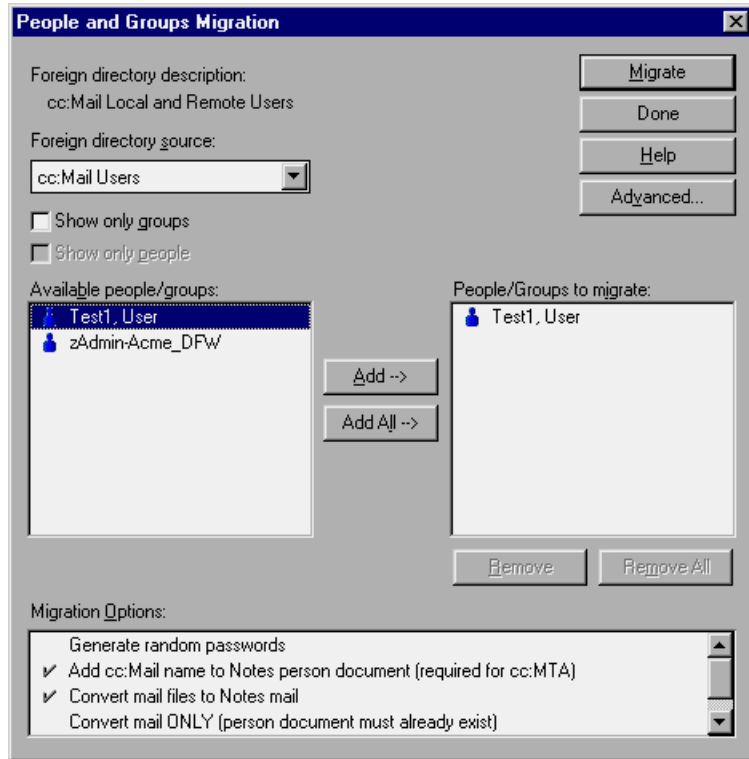
3. Click the Migrate People button. The following dialog box is displayed:



4. Select cc:Mail users from the Foreign directory source box. The cc:Mail Post Office Information dialog box is displayed:

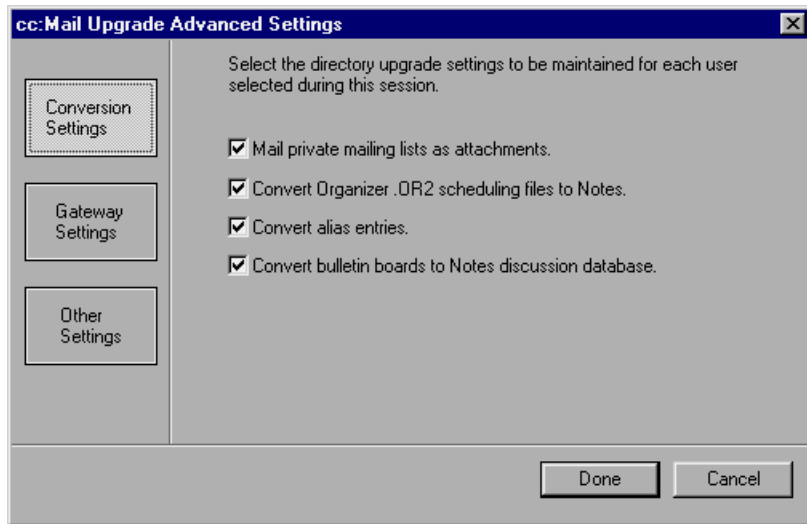


5. Specify the appropriate cc:Mail post office name, post office path and post office password, then click OK. The People and Groups Migration dialog box is displayed:



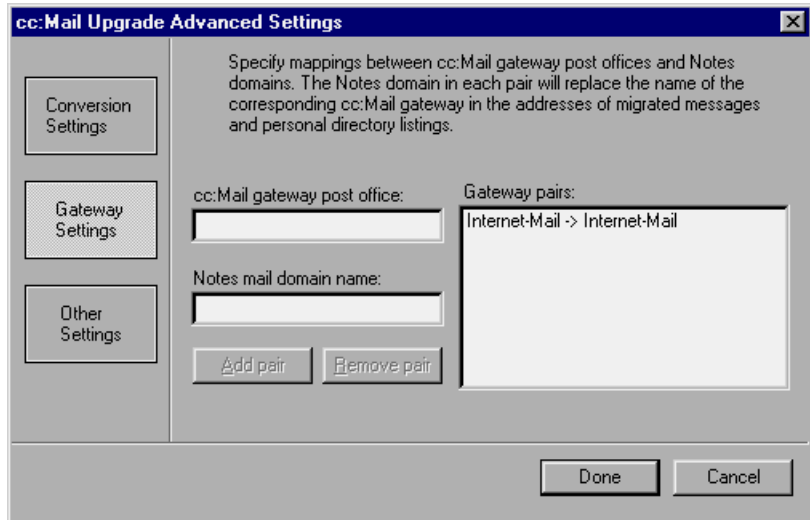
6. You can now select the users you want to migrate by clicking the Add or Add All button as required.
7. In the Migrate Options box, select the options as required by your environment.

8. Click the Advanced button. A dialog box named cc:Mail Upgrade Advanced Settings is displayed showing the available conversion settings options:



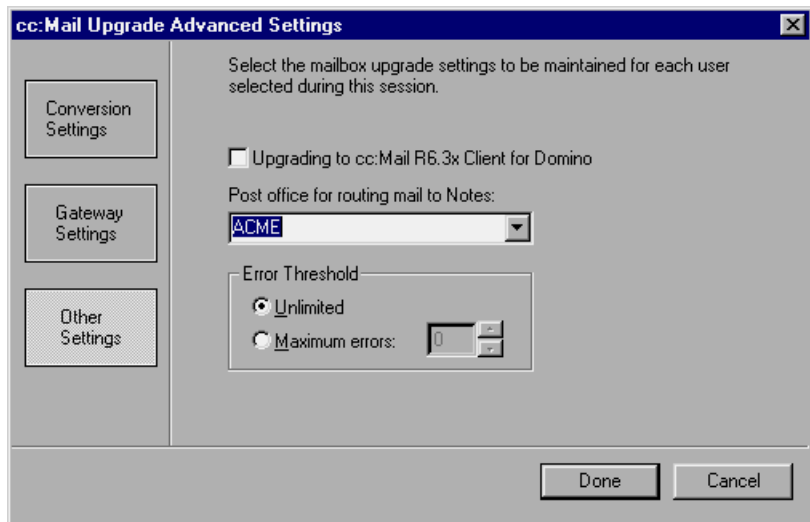
9. Selecting the Mail private mailing lists as attachments options will ensure that an e-mail is sent to the user with an attachment. This attachment is a Notes database containing the user's private mailing lists. The user must then paste the contents of this database into their personal address book.
10. Select the Convert Organizer .OR2 scheduling files to Notes option if you want to migrate Organizer-related data to Domino calendaring and scheduling.
Note You need the appropriate access to the Organizer files to perform the migration.
11. Select the Convert alias entries option if you want to migrate cc:Mail aliases. They will be inserted into the Full Name field of the person document located in the Domino Directory.
12. Select the Convert bulletin boards to Notes discussion database option if you want to convert the cc:Mail bulletin boards to a Notes database. This database will be mailed to the user.
Tip If you have activated the exchange of bulletin board information through the cc:Mail MTA, deselect this option to ensure that the user will continue to have access to the latest bulletin board information.

13. Click Gateway Settings. The following options are available:



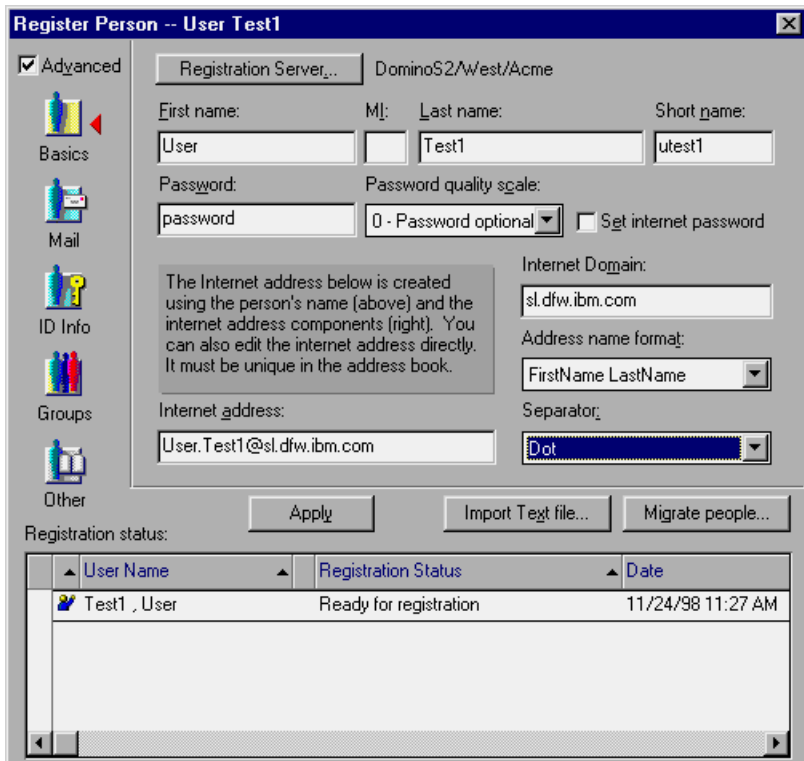
14. Specify the appropriate gateway information to allow the user to reply to messages migrated by Domino Upgrade Services. This will ensure correct addressing.

15. Click Other Settings. The following options are available:



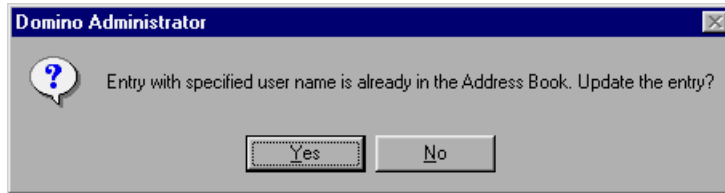
16. If you want any existing cc:Mail Release 6.3 clients to run against a Domino Release 5 back-end server, check Upgrading to cc:Mail R6.3x Client for Domino.

17. In the Post office for routing mail to Notes field, specify the appropriate Domino domain. Once the users have been migrated, any cc:Mail e-mail messages addressed to them will be routed to their Notes mail files.
18. Click the Done button, and you return to the People and Groups Migration box.
19. Click the Done button again. The Register Person dialog box is displayed. The users you just selected for migration are shown in the Registration status list.



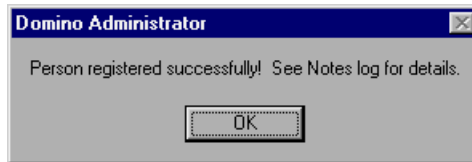
20. Select the users and click the Register button or click the Register All button to begin the Notes registration process. A directory entry is created for each user and the users' mail files and mail messages are converted to Notes. If you selected to migrate Organizer data, that data will also be migrated.

Tip If the user was already registered in the Domino directory (which will probably be the case if the cc:Mail MTA is running) then the registration process may display the following message during migration:



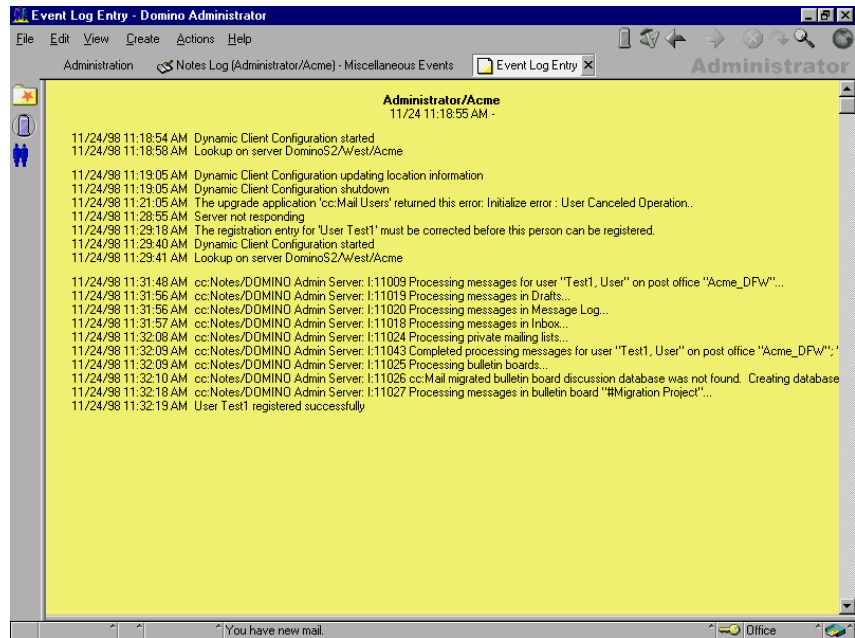
You should click the Yes button to update the directory entry with the Notes information as you will otherwise have two entries with the same name.

21. When the registration tool has finished, you will see the following message:



22. Click OK.

The migration tool has written several messages to the Notes log. They will look like this:



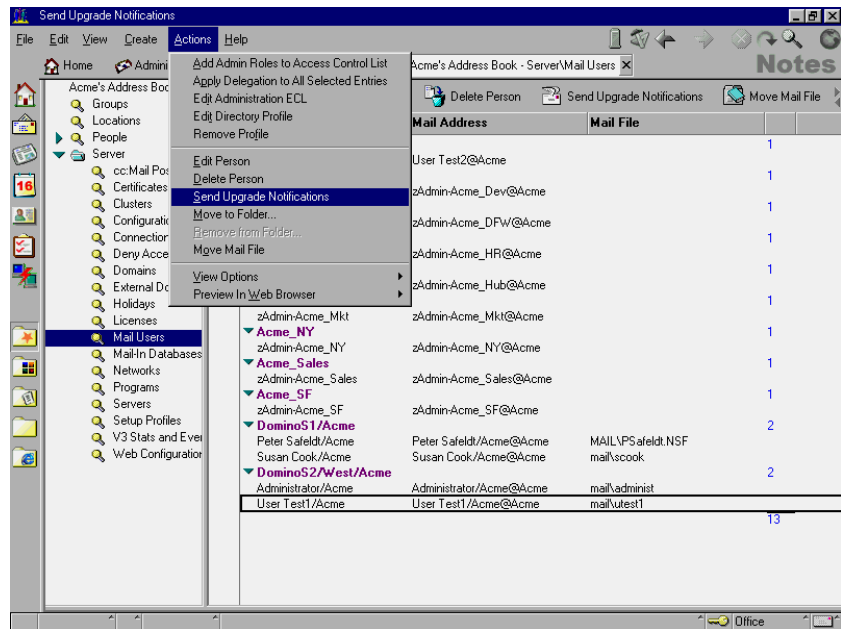
Using the Migration Wizard for cc:Mail

The Domino Upgrade Services for cc:Mail do not convert the cc:Mail users' archive files and private directories to the Notes/Domino format. A separate utility is available to convert this information for the user. This is called the cc:Mail Upgrade wizard.

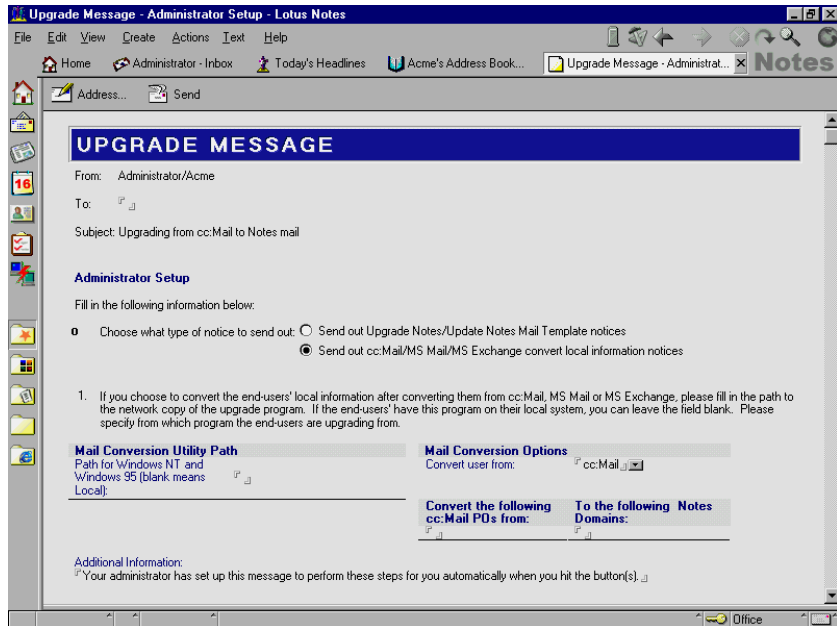
The administrator can activate this feature by sending the user a "Send Upgrade Notification" message.

Follow these steps:

1. In the Domino Directory, open the Mail Users view.
2. Choose Actions — Send Upgrade Notifications, as shown in the following figure:

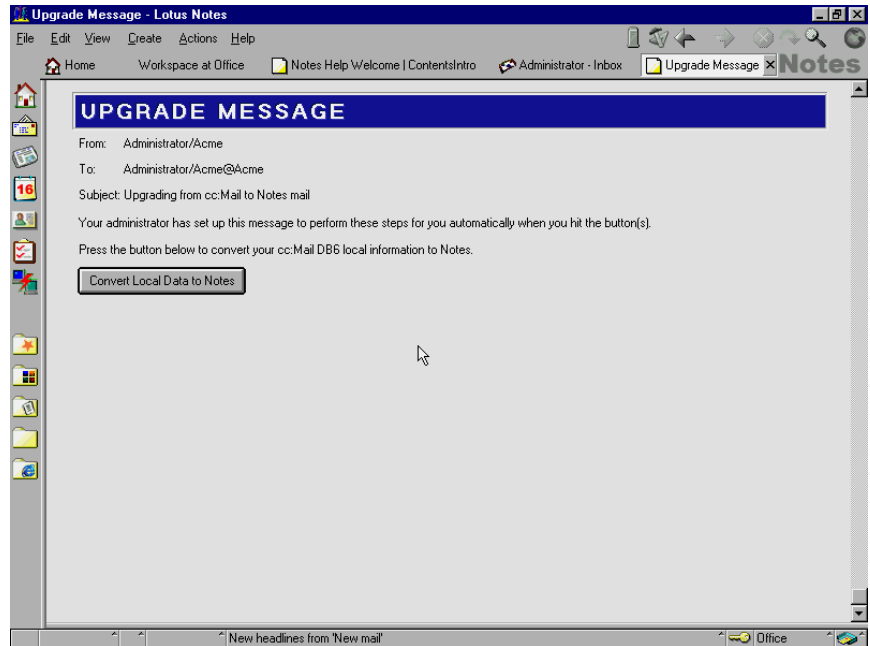


The following Upgrade Message box is displayed:

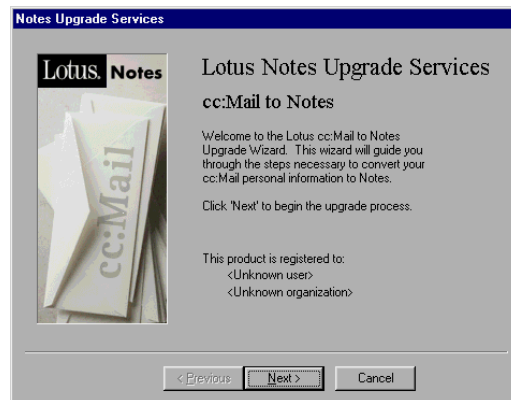


3. Fill in the appropriate addressing information in the To: field.
4. Click the radio button named Send out cc:Mail/MS Mail/MS Exchange convert local information notices.
5. Under Mail Conversion Options, specify the appropriate source system, in our case, cc:Mail.
6. Fill in the remaining fields as required.
7. Send this notification to the user.

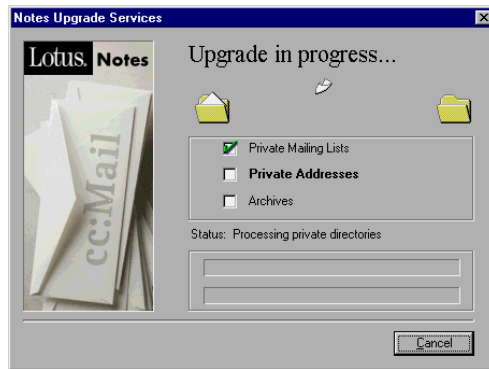
The user will receive a message similar to the following:



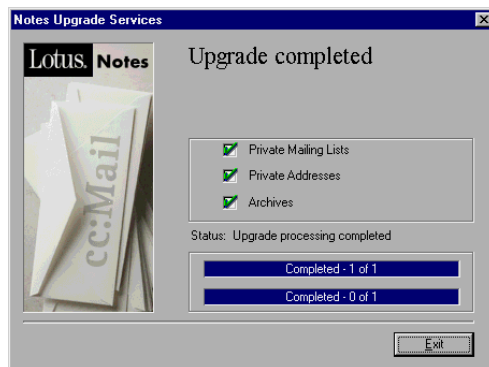
8. When the user clicks the Convert Local Data to Notes button, the following message is displayed:



9. When the user then clicks the Next button, the tool starts processing and displays the following type of status message:



10. When the upgrade is completed, the following is presented to the user:



The user's local cc:Mail data has now been migrated to Notes/Domino.

Preparing the Lotus cc:Mail Environment for Migration

From previous experiences in the field, we have found it is very valuable to stabilize your Lotus cc:Mail environment before beginning any migration activities. If the environment is not stable, you may spend too much time resolving cc:Mail-related problems instead of performing the migration.

Some of the tasks you may need to perform are listed below. We recommend you review the list and evaluate which might be applicable to your environment. Each task is then discussed in detail.

- Using cc:Mail SmartUpgrade to upgrade cc:Mail clients
- Centralize the cc:Mail user administration if possible.

- Streamline the post office (PO) maintenance by running CCSAVE/RECLAIM frequently.
- Remove unused post offices and/or user addresses from the directory.
- Have the users delete unused mail, and/or implement scheduled deletion.
- Convert DB6-based post offices to DB8.
Note This must be done in due time to be Year 2000 (Y2K) ready. cc:Mail post offices based on DB6 are not Year 2000 ready.
- Standardize the cc:Mail utilities and Router and the procedures being used.

Using cc:Mail SmartUpgrade to Upgrade cc:Mail Clients

If you are using cc:Mail Release 6.x or higher, you can take advantage of cc:Mail SmartUpgrade.

This tool is built into all newer cc:Mail clients (Release 6.x or higher on all platforms).

The tool allows an administrator to deploy new versions of cc:Mail to the end-user workstations without having to touch the users' workstations. It can also be used to upgrade all cc:Mail Release 6.x clients to Lotus cc:Mail Release 6.3, thus facilitating the upgrade of the back-end infrastructure from cc:Mail to Domino, all of this again without the need to touch the users' workstations.

SmartUpgrading is controlled by the CCVER.TB file placed in each post office directory.

This file has mainly two purposes:

- Controlling the SmartUpgrading feature
- Controlling which version of each product has access to the post office

When a client logs on to the post office, it looks for self-referring information in the CCVER.TB file. For example, the 16-bit Windows LAN client looks for the [WIN16_MAIL] section, the 16-bit mobile client looks for the [WIN16_MOBILE] section, and all cc:Mail 7.x and 8.x Windows clients look for the [WIN32_MAIL] section.

The default information for the [WIN16_MAIL] section looks like this:

```
[WIN16_MAIL]
LatestUpgrade=
Path=
Choices=
```

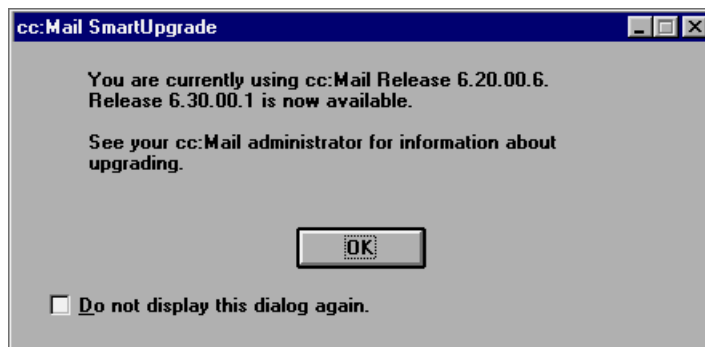
In this example, SmartUpgrading is not active.

In the following example, SmartUpgrading is active:

```
[WIN16_MAIL]
LatestUpgrade=6.30.00.1
Path=\\FILSERV1\CCMINST\CCM63\INSTALL.EXE
Choices=2
```

The LatestUpgrade line indicates that we want to upgrade the current cc:Mail version to cc:Mail Release 6.3. When a 16-bit Windows client logs in, it checks the information in the CCVER.TB file and takes one of the following actions:

- If the version of the cc:Mail client is higher than or equal to the version indicated in the LatestUpgrade= line, it is assumed that the upgrade to the next higher version of cc:Mail has already taken place. Therefore, the upgrade process is skipped.
- Next, the Choices= line is checked. Choices= can have one of the following values:
 - If the value is 1, SmartUpgrade notifies the user that a higher version of cc:Mail is available. In our example shown below, this would be cc:Mail Release 6.3. The following message is presented to the user:



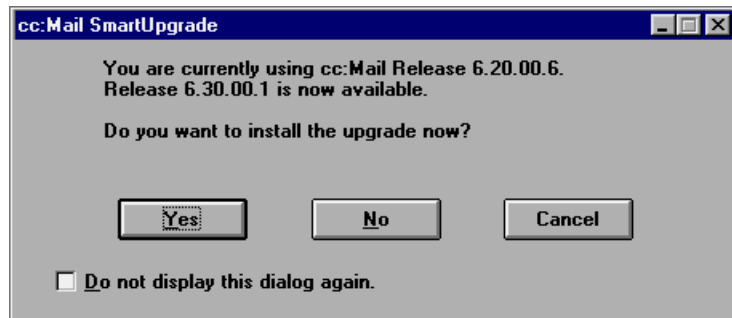
After clicking OK, the user can continue to work with the current version of cc:Mail.

- If the value is 2, SmartUpgrade notifies the user that a higher version of cc:Mail is available. In our example shown below, this would be cc:Mail Release 6.3. The message looks like this:



When the user clicks the Install button, the new release of cc:Mail is installed. SmartUpgrade starts the application pointed to by the Path= line. The user is not allowed to log in unless the cc:Mail version in use is equal to or higher than the version shown in the LatestUpgrade= line.

- If the value is 3, SmartUpgrade notifies the user that a higher version of cc:Mail is available. In our example shown below, this would be cc:Mail Release 6.3. The message looks like this:



The user is asked if they wish to upgrade. If they do, the application pointed to by the Path= line is then started; otherwise the user is allowed to log in.

Tip The installation program prompts the user for various installation options such as where to install the software and which options to install. You may wish to use a response file with all this information specified, and then use an automated install procedure. In the cc:Mail installation directory, you will find a sample response file, INSTALL.RSP. Copy this, and make the modifications you need following the instructions in the file. Change the Path= line in CCVER.TB to something like this:

```
Path=\\redbooknt2\ccmail\cc63win\install.exe /A  
\\redbooknt2\ccmail\cc63win\redbook.rsp
```

By doing this, the SmartUpgrade will run without asking the users a lot of questions.

Centralizing cc:Mail User Administration

Large cc:Mail environments with decentralized user administration may have problems with the directory being maintained from several locations.

It is essential that control over the directory be maintained, especially during the migration project. Both the cc:Mail MTA and the cc:Mail to Notes migration tools modify the directory to a certain extent, so it is advisable to limit other directory access to prevent data from getting out of synch.

You may want to consider allowing the migration team to take control over the directory during the migration deployment phase.

Streamlining Post Office Maintenance

The following activities are recommended:

- Standardize the cc:Mail utilities used.
- Run scheduled maintenance of the post offices. At a minimum, you must perform CCSAVE and RECLAIM.

Tip On the cc:Mail 8.x CD-ROM, in the \UTIL directory, you will find a couple of sample files (MAINT.BAT for DOS, and MAINT32.BAT for NT) which you can modify and run regularly to maintain your post offices. Because of the 24x7 availability feature of the DB8 post office, you can specify a call-list entry to have the Router run these tools on a scheduled basis.

Removing Unused Entries from the Post Office

Before beginning migration is a good time to review the cc:Mail directory and remove all old and unused entries. Check for post office names or gateways no longer in use and also remove user names associated with them. This will facilitate a clean migration to Notes/Domino.

Deleting Unused or Unneeded Mail

Encourage your users to delete all mail which is no longer needed and/or have the system administrator run the MSGMGR utility regularly. Some suggestions for running MSGMGR are:

- Delete all entries in the trash folder more than 2 days old
- Delete all entries in the message log more than 30 days old

You should notify your users well in advance of implementing any new deletion policies for your cc:Mail system.

The less data there is to migrate, the faster the migration will proceed. Also, a streamlined cc:Mail environment will be easier to maintain.

Converting Post Offices to DB8

There are several reasons why we recommend you upgrade your cc:Mail post offices to DB8. They are:

- All cc:Mail post offices planned to be in use after the Year 2000 must be upgraded to DB8 to be Year 2000 compliant.
- With DB8-based post offices you can run maintenance without taking the post offices out of service.
- If your post offices are DB8 based, you can use the cc:Mail SmartUpgrade feature to migrate to a Release 6.3 client.

Standardizing the cc:Mail Utilities and the Router

Make sure you use the latest version of the cc:Mail utilities across your cc:Mail environment. More importantly, use the same version of the utilities, not different versions in different places.

Documenting and Planning the Coexistence and Migration Strategy

When deciding which coexistence and migration strategy is appropriate for your company, you need to consider the following:

- Are you going to migrate the users' mailbox data?
- Are you going to migrate calendars?
- Are you going to provide coexistence between the old environment and the new environment?

Once you have the answers to these questions, you must also review the naming standards in place for both your users and for your messaging infrastructure elements. This is discussed in the following section.

User Naming Standards: Lotus cc:Mail versus Lotus Notes

Lotus Notes uses a hierarchical naming scheme while Lotus cc:Mail typically uses one of the following:

- "Lastname, Firstname". This is the recommended method and works well for even larger organizations.

- “Firstname Lastname”. This method is often used by many smaller organizations.
- “Userid” or similar “shortname”.
- Combination of above naming schemes

In addition, the following is also used in cc:Mail naming schemes:

- Use of middle initial letter
- Use of title
- Use of alias

This provides for several configuration options, which are discussed below.

Notes Names in cc:Mail

If you want to establish coexistence between cc:Mail and Notes, one of the things you need to decide is how your Notes names should be propagated to your cc:Mail system. The default is Lastname, Firstname.

If you begin to use organizational units in your Notes naming scheme, there is a risk of name collisions in the cc:Mail system. For example, “John Doe/Accounting/Acme” and “John Doe/Sales/Acme” would both end up as “Doe, John” in the cc:Mail directory if you use the cc:Mail default naming convention.

The solution to this would be to propagate the hierarchical name to cc:Mail, for example, “Doe/Accounting/Acme, John”. You would do this by selecting “First Hierarchical Name” in the “Full Name Propagation” field of the cc:Mail Post office document. As a result, you will have Doe/Accounting/Acme, John listed in the cc:Mail directory.

Note If you choose to propagate hierarchical names to cc:Mail, your users’ names change when they are migrated to Notes at a later point-in-time. For example, when you then migrate Doe, John, his name will be changed to Doe/Accounting/Acme, John in the Domino directory.

If you use the “firstname lastname” option in your cc:Mail system, you will need to change the cc:Mail MTA configuration by adding the line `ccmta_RestSpaceLastFormat=1` in the NOTES.INI file of your cc:Mail MTA server. When you migrate the user later on, for example, John Doe, his name will be shown as John Doe in the Domino directory.

If you then decide in favor of the Notes hierarchical naming scheme, you would again select the “First Hierarchical Name” option in the cc:Mail Post office document. When you migrate that user later on, for example, John Doe, his name will be shown as John Doe/Accounting/Acme in the Domino directory.

cc:Mail Names in Notes

If you use the “Lastname, Firstname” option in your cc:Mail system, you should typically have no problems. In Notes, the user’s last name would go into the Lastname field, and the user’s first name would go into the Firstname field.

If you use the “Firstname Lastname” option in your cc:Mail system, then the first word of the directory entry goes to the Firstname field in Lotus Notes, and the rest goes to the Lastname field. You will have to manually check the names of users with more than one first name or last name, and fix problems by recertifying these users after migration, or use the “preprocessing names” option of the cc:Mail to Notes migration tool. This is not recommended if you are using the cc:Mail MTA to handle directory information.

If you use user IDs or shortnames in your cc:Mail system, the cc:Mail MTA will not render the names in the Notes directory in the expected Notes format. An intermediate step is required to fix problems. You can either use the “preprocessing names” option of the cc:Mail to Notes migration tool, or change the name after the migration by recertifying the user.

Infrastructure Naming Standards: Lotus cc:Mail Versus Lotus Notes

Infrastructure element names listed below must be unique in their individual environments as well as in the combined cc:Mail and Notes/Domino environment:

- cc:Mail post office names
- Domino server names
- Domino domain names

All these names show up in the cc:Mail directory as “p” or “P” entries.

Caution Make sure your future naming standard takes this into consideration. For example, your future Domino domain name must not have the same name as one of your cc:Mail post offices.

Managing Risks

The project migration team must carefully evaluate the elements of the existing cc:Mail environment, in particular, with regard to naming conventions, the elements of the new Notes/Domino environment, and the business requirements to choose a coexistence and migration strategy which best meets the company’s needs. By overlooking any of these areas, the project team runs the risk of choosing a strategy which will cause problems for the users and may impact the company’s business operations.

Summary

In this chapter, we started out by defining the terms migration and coexistence.

Next, we covered which coexistence strategy to select. This is basically a decision between whether or not to use the Lotus cc:Mail MTA. We explained a variety of possible cc:Mail topologies. We touched on calendaring coexistence between Organizer 2.x and Notes/Domino calendaring and scheduling before covering aspects related to moving an existing SMTP implementation such as cc:Mail SMTPLink to the Domino SMTP MTA.

We then discussed which migration strategy to select. This decision involves how much data should be migrated if any. We talked about the Lotus cc:Mail Release 6.3 client.

In the following section, we provided information on the available migration tools, both for Domino Release 4.x and Domino Release 5 available as Beta 2 at the point of writing this redbook.

We gave you some tips on how to prepare the cc:Mail environment for the migration process, for example, by using cc:Mail SmartUpgrade to upgrade your cc:Mail clients to a more recent version of cc:Mail including Release 6.3, and by performing several maintenance activities related to the cc:Mail post offices.

Finally, we emphasized the need to document any decisions you have made with regard to the coexistence and migration strategy you selected. This includes documenting your current cc:Mail naming standards and the implications this has when converting cc:Mail directory entries to Notes/Domino.

Chapter 8

Piloting the Coexistence and Migration Strategy

Validating the design of your coexistence and migration strategy and ensuring all users a smooth transition from the old messaging environment to the new messaging environment is the goal of this phase of the project. During this phase, the project team must also ensure all support personnel, such as system administrators and help desk staff, are fully prepared to handle questions and problems relating to migration, to coexistence, and to the new messaging environment.

In this chapter we will discuss the following activities involved in testing and piloting the coexistence and migration strategy.

- Installing the software and tools for migration and coexistence
- Testing and change management
- Pilot deployment
- Pilot exit
- Internal marketing
- Managing risk

Many of the activities discussed in this chapter are like those covered in the chapter on testing and piloting the new messaging environment. However, there is a greater involvement of systems administrators and support staff. Also during the pilot step of this phase, you will be working with live data. Thus, there is the potential to substantially impact the company's business operations if problems occur.

Installing the Software and Tools

You must complete the installation of any new or additional hardware and software required to support the migration and coexistence activities. Once the coexistence and migration environment is established, the function of each component should be verified before beginning the formal testing.

All installation activities should have been scheduled in the previous phase of the project as soon as the coexistence and migration strategy was finalized. Additionally, the process to purchase any new hardware should also have begun in the previous phase to allow sufficient lead time to complete the acquisition process.

Testing and Change Management

Testing the design of the coexistence and migration strategy and exercising the new support structure are key tasks. You want to uncover any possible problems before beginning the migration of large numbers of users.

The following activities are part of testing and change management:

- Developing a test plan
- Selecting test users
- Developing test matrices
- Executing the test plan
- Processing results and feedback
- Managing change

Developing a Test Plan

The overall test plan must cover the following topics:

- What needs to be tested?
- Where will the testing take place?
- When will the testing occur?

What Needs to be Tested?

The following items need to be tested:

- How are users' mail IDs going to be migrated?
- How is current messaging data going to be migrated?

Note This may not be a factor if your company has determined that no data from the old messaging environment will be migrated to the new messaging environment.

- How will directory entries be migrated?
- How will services continue to operate?
- How will applications operate?

Another key area which needs to be tested is the ability of the coexistence solution to handle expected levels of traffic between the old and the new messaging environments. Based on your migration deployment strategy, you need a good estimate of the amount of traffic expected between the two systems as more and more users are migrated. Ensure you have specified the hardware and topology to meet the maximum load.

Where Will the Testing Take Place?

It is recommended the testing of the coexistence and migration strategy be carried out in an environment utilizing separate test data. Use a test cc:Mail post office with its' own set of test users and existing mailbox data to test out the migration tools and procedures.

When Will the Testing Occur?

If utilizing a separate test environment, general migration testing can occur during normal business hours. However, tests involving production applications and services should initially be scheduled at times when any problems would not affect the majority of users or business operations.

Selecting Test Users

Testing the coexistence and migration strategy will likely involve the system administrators, and possibly the help desk staff, responsible for both the old and the new environments. Working along with the project team, especially those responsible for the design of the coexistence and migration strategy, the system administrators will perform test migrations and verify the accuracy of the results.

Note The system administrators and the help desk personnel should have already taken their system administration and end-user training by this point. However, you will need to ensure they are provided with training on the coexistence and migration strategy and on whatever software and tools are being employed to carry out that strategy.

If part of your company's strategy calls for end-users to migrate or upgrade their client software themselves, it is recommended members of the project team or a select group of end-users carry out this role during the initial testing. In either case they should be working with test data as opposed to live data.

Developing Test Matrices

Test matrices must be developed which ensure all areas of the coexistence and migration strategy and the support structure are validated and exercised.

The project team must document the specific types of migrations to be performed and how to test the coexistence of applications and services. Specific test cases for both areas should be created and documented.

Provide the system administrators and other testers with handouts which list the following items:

- A description of each test case to be performed
- An identifier for each test case
- The expected result of each test case
- A place to record the actual result of each test case
- A place to record an incident report number if the test case fails and it needs to be reported to support
- A place to record if the problem has been resolved and how it was resolved
- A place to record results of a re-test

Executing the Test Plan

To begin execution of your plan, hold a kickoff meeting with the test users. Explain the following to them:

- Goals of the testing
- Their roles and responsibilities
- The test matrices and how to use the handouts
- The review process and scheduled meetings
- How to report problems
- The projected timeline for the testing

During the first few days of the testing, have members of the migration project team check with the testers to ensure all is going well. Deal with any issues or problems immediately.

The project team member(s) responsible for testing should keep running track of how each of the testers is progressing through his or her test matrix. This will let the team know quickly whether the originally established timeline is accurate or will need adjustment.

Note Early in the testing, the project team members responsible for training should ask the systems administrators and testers to evaluate the effectiveness of the training they received regarding the coexistence and migration strategy and tools. Was the right material covered and did they get all the information they needed to enable them to do this testing efficiently and to do their jobs once the general migrations begin and the new messaging environment rapidly expands? These evaluations must then be reviewed and, if needed, changes made to the training and training materials before the pilot users or the general users start their training.

Processing Results and Feedback

Schedule regular review meetings with the testers. Review their progress in completing the test matrices and discuss all problems they have encountered. Ensure all problems have been reported and are being accurately tracked. When appropriate, have specified test cases repeated to validate changes and ensure those changes have not caused any regression errors.

Managing Change

The iterative process of reviewing and making corrections must be tightly controlled. Change management procedures should have been developed and established as part of the project phase testing and piloting the new messaging environment. These same procedures should be applicable to this step as well.

Note In establishing your change management policies and procedures, be sure to include plans for a 'worst case scenario'. Discuss ahead of time what to do if a major problem is encountered during the test phase which is going to seriously impact the overall project.

Pilot Deployment

In the pilot of the coexistence and migration strategy a small group of users representing different types of migration needs will be working with the system administrators and the project team.

Some of the possible categories of users include:

- Users with little or no existing mailbox data
- Users with a large amount of existing mailbox data to be migrated
- Users heavily dependent on applications which are migrating
- Users heavily dependent on services based on the messaging infrastructure
- Users scheduled for early migration who interact heavily with users not scheduled to be migrated until later in the project timeline

Pick representative users from categories such as those mentioned above and/or other categories specific to your environment.

Since you will be working with live data, ensure all data is backed up. You must also be prepared to 'go back' in case problems with a user's migration would prohibit them from performing their daily business tasks.

Note This group of pilot users should be identified at the beginning of this phase of the project and scheduled into training classes as soon as an evaluation of the training program has been completed by the initial testers and reviewed by the project team.

At this point all technical issues should be resolved and you will be looking for validation of things such as:

- Ease of migration
- Accuracy of data migrated
- Accessibility to and operation of applications and services
- Ability to communicate effectively between the old and the new messaging environments

If problems do occur, all users must be made aware of the proper way of reporting them. The project team must track all reported problems and use the same procedures they did in the testing phase to handle changes and re-testing.

Pilot Exit

A set of criteria for determining pilot completion must be established by the project team. This criteria should include things such as:

- A resolution plan for known problems
- Is any needed documentation complete
- Are any further modifications needed to the training materials
- Has training been scheduled for the general user population
- Are any internal marketing materials ready

After reviewing this criteria, it will be the project team's job to make the decision about whether or not to go forward with the project.

If it is decided the project is not ready to move forward, the team must decide which step they must go back to and what the impact on the overall project will be. The team must also document the risks if they do not go back.

Then the issues impacting the project should be summarized and an update to the project plan and schedule prepared. This information should be presented to and discussed with the project sponsor and company management to gain concurrence on how best to proceed.

Internal Marketing

The key points for any internal marketing activities are:

- Communication
- Positive reinforcement
- High-level support

Communication

This project is going to affect the daily work of everyone in the company. Therefore, steps should be taken to keep all employees aware of general project activities and to notify them when key events are going to occur for the company or for their specific department or area.

Now that the general migration is about to begin this communication is key.

Positive Reinforcement

Direct communication to all employees from the project sponsor and senior management emphasizing the importance of the migration to the company's overall operations and expressing their enthusiasm and encouragement is reinforcement that will provide a very positive focus and help lessen employees' apprehension.

High-Level Support

A tangible show of support for the project is to have the project sponsor and other key management representatives participate in the pilot of the new environment. Not only will their feedback be important in ensuring the project is meeting its' goals but publishing their participation and their positive reactions about how easy it was to migrate will build employees' confidence.

Managing the Risk

Ensuring you have developed a strong, workable, accurate coexistence and migration strategy is key to this entire project.

There may be a tendency for many companies to shorten or bypass this phase of the project. If you do not validate the coexistence and migration strategy and work out the problems within the community of the project team and testers, the 'bound-to-occur' problems and potential design flaws will be considerably magnified if found when you begin migrating large groups of users.

Most end-users do not like change. But if what they see is a smooth transition to a well-designed, functional, and stable new environment, their acceptance will be faster and less problematic for them, the project team, and the corporation.

The lack of a thorough and complete testing and pilot phase will expose the project and the company to significant risk. So many functions in today's companies rely on the messaging infrastructure that a breakdown in that area will have real, tangible consequences for the business.

Summary

In this chapter we have discussed the key steps in the testing and piloting the coexistence and migration strategy. These are critical steps which, if not done well, will have a tremendous negative impact on the project, on the deployment of the new messaging environment, and on the company's business.

Chapter 9

Deploying the Coexistence and Migration Strategy

At this point you have validated the design of your new messaging environment and the coexistence and migration strategy for moving the company to that new environment. Now the push begins to move users from the old environment to the new environment. Key activities in this step of the project are:

- Training the general users
- Communicating the plans and strategy
- Announcing the kickoff

Training

Throughout earlier steps in the project, test and pilot users have attended end-user feature and function training and applications training. After those early training sessions, you should have received evaluations from the students about the content and relevance of the training materials and the effectiveness of each of the courses. After processing these evaluations, your training programs should have been fine-tuned and made ready for the general user population.

Now, based on the planned migration deployment schedule, all users must be scheduled to attend the appropriate training. You want to time the training so it is delivered to the users just before they are scheduled to be migrated. In this way the information about the new features, functions, and applications will be fresh in their minds.

If there is too large a time gap between training and migration, the students will not retain enough of the material to make the transition from the old to the new proceed smoothly. If in certain cases, a gap will be unavoidable, remember there are online training tools for the Lotus Notes environment which can help close the gap. Please refer to the chapter on Developing the Training Plan for more details on these tools.

Evaluations should continue to be part of the training at this stage. You may find there are certain features or functions more novice users are having difficulty with that will need additional focus or follow-up training. There may also be users who wish more advanced training once they are familiar

with the capabilities of the new environment. The project team should track these requests for advanced training and decide whether they are part of the scope of this project or whether they should be turned over to the corporate training group for follow-up.

Be sure to let everyone know when they are scheduled to attend training. Also be sure to schedule some make-up sessions for those who cannot attend when they were originally scheduled. You also need to be cognizant that not everyone from a single group or department can likely be scheduled away from their jobs at the same time. Work with the group or department managers to develop a schedule which meets both the daily business needs and the need to get everyone trained on the new environment.

The project team will also need to track the training to ensure everyone scheduled to receive training actually receives the training appropriate for their use of the new environment. Student rosters should be created for each class and each student's attendance recorded. Course certificates should also be given to students as they complete a course.

Communicating

It is very important to communicate the coexistence and migration strategy and the deployment schedule to all those being affected.

The previous section talked about feature/function and application training for the users; but you also need to provide the users with training on the coexistence and migration strategy. A high-level overview of the business requirements which are driving the project and an overview of the migration strategy will help them understand why this is all happening. The better the user's understanding of the project, the more comfortable they will feel about the changes.

As part of developing the coexistence and migration strategy, the project team should have developed a detailed migration deployment plan. This plan should document a staggered schedule for migrating users by functional groups, departments, or geographic locations. The choice of option or options should be whatever is logical and efficient for your company.

This deployment schedule should allow breaks after the first group migrates and after other key migrations. These breaks will enable the project team to verify the results being achieved and make any necessary modifications to either the strategy or to the remainder of the timeline.

The timeline should then be communicated to the entire company so everyone knows when they are going to be migrated.

Announcing the Kickoff

Once the deployment timeline has been completed, the project team should schedule an official kickoff for the migration. Depending on the size of the company, this might be done through a company meeting or through a broadcast e-mail from the project sponsor to the entire company.

Other types of marketing activities over the course of the migration will reinforce a positive focus and help the users realize they are key in helping the corporation achieve the business goals of this project. Weekly or biweekly updates from either the project team or the project sponsor are one way of doing this. Another idea is a small promotional item marking the project or the migration to the new messaging environment.

Summary

While the migration of the users and the deployment of the messaging environment will keep the project team very busy, it is also the time when the team will begin to see the results of all their efforts thus far. If all the previous project steps have been carried out thoroughly and completely, the deployment should go smoothly. But, if problems are encountered, the detailed groundwork already done should enable a quick and efficient resolution with minimum impact on the overall project.

Chapter 10

Closing the Coexistence and Migration Project

You have now completed the work involved in migrating the users in your company from Lotus cc:Mail to Lotus Notes and Domino. Before closing out this project, the team should take time to review the following areas:

- Overall project planning and execution
- Needs for additional or ongoing training
- Requests for new or improved applications based on the new messaging infrastructure

Overall Project Planning and Execution

The project team should review how this project was planned and how well that plan was executed. The team should discuss:

- What was done well?
- What could have been done better?
- What would they do differently if they had to do a similar project again?

This information should be put together in a closing report that becomes part of the permanent documentation on the project. The information should also be incorporated into any general project management information kept by the company for future reference by other project teams. If there were any mistakes made during the project, you may want to make sure the team learns from them and try to prevent others from potentially repeating those mistakes.

Needs for Additional or Ongoing Training

There will have been a great deal of training delivered throughout the course of this project. The project team should complete a final evaluation of all training courses and training materials.

The project training plan and the project close-out findings should be documented and turned over to the corporate training group for assistance in scheduling any ongoing training or planning new hire training in the future.

Requests for New or Improved Applications

As part of this project there were likely several key business applications which were migrated from the old Lotus cc:Mail environment to the new Lotus Notes and Domino environment. Now that users and managers have seen the capabilities of the new infrastructure there will likely be requests to improve existing applications and to develop new applications. A process for handling these requests should be documented and published to the entire company.

Summary

Now that the majority of the project work has been completed, it is a good idea for the project team to review their work and highlight things which were done well and things which could have been done better.

The primary goal of this project has been to migrate the company from Lotus cc:Mail to Lotus Notes and Domino but a secondary goal in any project is to learn from the experience and ensure the lessons learned can be applied to future projects.

Appendix A

Planning Worksheets for Lotus cc:Mail

In the following, we provide two planning worksheets you may find useful when documenting your current cc:Mail environment.

The first worksheet is for basic post office information. We recommend you complete one worksheet for each post office.

cc:Mail Post Office Information Worksheet Your Post Office

cc:Mail post office name:

cc:Mail post office password:

cc:Mail router protocol:

cc:Mail router network address:

cc:Mail post office call password:

cc:Mail router IP port (if IP is used):
21 or CC0

cc:Mail post office code page (DB8 only):

cc:Mail post office administrator:

cc:Mail post office administrator password:

cc:Mail post office path:

The second worksheet is for statistics information related to your post offices. Again, we recommend you complete one worksheet for each post office.

cc:Mail Post Office Statistics Worksheet

Your Post Office

cc:Mail post office name:

Total size of post office:

Total size of shared messages:

Total size of messages (not shared):

Total number of local users in post office:

Total number of remote users in post office:

Appendix B

Available Coexistence and Migration Tools

This appendix outlines the offerings available for messaging migration to, and coexistence with, Notes/Domino.

This appendix makes reference to third-party products. By including them in this document, IBM/Lotus do not solely endorse these products for use in this type of environment. Other third-party products may be available that perform similar or equivalent functions.

Some of the terms used are defined in the following:

- DUS: Domino Upgrade Services; the integrated registration and conversion process provided by Domino Administrator in Release 5.
- DME: Domino Migration Engine; server task to take mail from foreign e-mail systems and convert or install it in a Domino mail file. Currently available on NT and OS/2.
- LMS: Lotus Messaging Switch.
- IMLG/2: IBM Mail LAN Gateway; bi-directional messaging gateway between SNADS-based systems, such as Office/Vision, and the Domino server. Runs on OS/2.
- LCCOV: Lotus Calendar Connector for OfficeVision; bi-directional calendar gateway for free-time search and scheduling.

The following table lists the available coexistence and migration tools.

Note The list of available tools is subject to change. Products that were future deliverables at the point of writing this manual are shown in *italics*. Refer to the Lotus Web site www.lotus.com/migration for more information.

<i>Platform</i>	<i>Domino Release 4 Migration</i>	<i>Domino Release 5 Migration</i>	<i>Coexistence tools</i>	<i>Comments</i>
LAN and Internet messaging products				
cc:Mail/Organizer	Lotus cc:Mail admin/end user tool Download from www.lotus.com/migration or in the APPS directory on the Domino 4.5.6, 4.6.2 and later CDs Lotus Organizer 97GS admin tool. Installed with Organizer 97GS Binary Tree Organizer to Notes admin/end user tool (licensed by Lotus)	<i>Lotus cc:Mail DUS admin tool</i> <i>Lotus one-button end user tool</i> <i>Lotus Organizer DUS admin tool</i> <i>Binary Tree Organizer end user tool (licensed by Lotus)</i>	Lotus cc:MTA 2.0. Download from migration Web site or in the APPS directory on the Domino 4.5.6, 4.6.2 and later CDs Lotus Organizer free-time plug-in and translation. Included with Organizer 97GS Lotus cc:Mail Release 6.3 client. Works with Domino 4.5.5 and 4.6.x. <i>Update to work with Domino Release 5 in plan.</i>	cc:Mail to Notes tools are also available from Binary Tree and other partners cc:Mail end user tools are 32-bit only Organizer conversion does not provide planner or calls equivalents in Notes
Exchange/Outlook	Several business partner tools (Binary Tree, I/G OpenWare, Creative Business Solutions) for end user or admin use	<i>Exchange DUS admin tool</i> <i>Outlook wizard end user tool</i> Business Partner (BP) tools	MSFT Exchange/Notes connector Casahl RA.GroupWare*	
MS Mail and Schedule Plus	Lotus MS Mail end user tool (16-bit only) BP tools (Binary Tree et.al.), admin and end user (end user tool licensed by Lotus)	<i>MS Mail DUS admin tool</i> BP tools - Binary Tree et.al.	SMTP	

continued

<i>Platform</i>	<i>Domino Release 4 Migration</i>	<i>Domino Release 5 Migration</i>	<i>Coexistence tools</i>	<i>Comments</i>
GroupWise	Binary Tree admin and end user tools for GW4 and GW5 (licensed by Lotus) I/G OpenWare admin tool for GW5.x	<i>Binary Tree DUS admin and end user tool (licensed by Lotus and included in Domino Release 5)</i>	Novell GroupWise to Notes connector (OS/2 only)	Binary Tree's admin tool will work with Domino R5 DUS. End user tool still required for archives and other local data.
Banyan	CMS ViNo admin tool (uses DME)	Same	SMTP	
Other LAN-based or Internet mail	BP tools for Eudora, Netscape, Teamlinks, other platforms available from Binary Tree, I/G OpenWare Binary Tree tools for Netscape and Eudora licensed by Lotus	Same	SMTP	Binary Tree provides mail-only migration from Eudora and Netscape mail clients. I/G OpenWare admin tool for moving mail from TeamLinks
Host and traditional client/server messaging products				
OfficeVision/MVS	TBS Migra tool (uses DME)	Same	LMS IMLG/2 LCCOV	
OfficeVision/VM	IBM extract tool (uses DME)	Same	LMS IMLG/2 LCCOV	
OfficeVision/400	IBM extract tool (uses DME)	Same	LMS IMLG/2 LCCOV	Green screen client for AS/400-5250 terminals available
Verimation Memo	Service offering from IBM (based on DME)	Same	LMS	

continued

<i>Platform</i>	<i>Domino Release 4 Migration</i>	<i>Domino Release 5 Migration</i>	<i>Coexistence tools</i>	<i>Comments</i>
Other host messaging systems				
SYSM, Connect, EMC/TAO, HP OpenMail, DEC All-In-1	BP extract tools, some using DME	Same	LMS	<p>HP OpenMail tool in development by Apex Grp</p> <p>EMC/TAO and SYSM tools from CompuSven</p> <p>All-In-1 tools available from I/G OpenWare, LTD, and Altis</p>

* Casahl's RA.Groupware is an application coexistence tool for Exchange and Notes/Domino. It is positioned less for messaging than for applications.

Note In addition to the above, Wingra offers migration service offerings for MS Mail, cc:Mail, and GroupWise to Notes/Domino, based on their mail switch technology.

For further information, refer to the following business partner Web sites listed here in alphabetical order:

- Altis: www.altisltd.com
- Apex: www.adcapex.com
- Binary Tree: www.binarytree.com
- Casahl: www.casahl.com
- CBS: www.msphub.com
- CMS: www.cmsassociates.com
- CompuSven: www.compusven.com
- I/G OpenWare: www.iga.com
- TBS: www.tbsoft.com
- Wingra: www.wingra.com

Special Notices

This publication is intended to help you plan for a coexistence and migration project involving a migration from any LAN-based or host-based messaging system, in particular, Lotus cc:Mail, to Lotus Notes and Domino.

The information in this publication is not intended as the specification of any programming interfaces that are provided by Lotus Domino. See the publications section of the announcement for Lotus Domino and related products for more information about what publications are considered to be product documentation.

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