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At the Heart of Enterprise Collaboration

Breaking the Migration Barrier

From Lotus Notes to Microsoft SharePoint

Abstract

Collaboration across devices, workspaces, and geographical locations has become the norm for today's connected workforce. While Lotus Notes is an early pioneer of the information repository and access mechanism, many organizations are now choosing Microsoft Exchange and SharePoint. These new solutions provide better services, security, and features, which are more relevant in the present day, and businesses are switching to this competitive and cost-effective product mix. However, migrating from Lotus Notes to SharePoint can be challenging. Choosing the right techniques and tools will greatly help in simplifying effort and enabling a seamless transition.

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The Need of the Hour has Changed

In the early stages of computing with centralized operations, there was no real need to share data across systems. However, the emergence of personal computers and smart terminals created information islands raising the need to collaborate and share information across computers. Lotus Notes seemed to be a panacea for all the needs and offered a solution for collaboration, information sharing, information management and related functions. It soon became an integral part of the IT portfolio for most organizations due to its ability to replicate and develop applications rapidly, and provide offline content, data security, huge database, and Web server directory services.

Over the years, as technology became increasingly ubiquitous, and new needs and ways for data sharing were discovered, new players entered the fray. Each of these platforms had its philosophy and tried to fulfill user needs in a specific way. As features evolved and became sophisticated, platforms matured and morphed into specialized platforms for messaging, document management, content management, portals, and collaboration management. While businesses were moving into an era of highly scalable architecture, Web services and Service-Oriented Architecture (SOA), rich customer-facing applications, and mobile workforces; most of the available platforms did not provide rich capabilities and flexibility. Though Lotus Notes evolved with time, adding features such as web support, instant messaging, presence awareness, blog, wiki, and RSS support, other products caught up and offered better cost-feature benefits.

For this reason, many companies striving to be more efficient, more competitive and more cost-effective evaluated other collaboration products and in many cases decided to switch to competitive product mix such as Microsoft Exchange and SharePoint.

Microsoft's SharePoint platform underscores this growing desire to invest in the advanced technology. It is one of those platforms where a variety of information can be consolidated and managed. SharePoint provides enterprise-ready and integrated server capabilities. In the last few years, it has emerged as a strategic platform for organizations worldwide. Starting from SharePoint 2003, Microsoft Office SharePoint Server (MOSS) 2007, and Windows SharePoint Services (WSS) 3.0 to SharePoint 2010 and 2013, and to Office 365 (Microsoft's SharePoint offering in the cloud), there are many versions of SharePoint that can serve varied needs of users and organizations.

The purpose of this white paper is to describe the migration strategy and the tools used for migrating applications from Lotus Notes platform to SharePoint. Although, Lotus Notes migration would typically also involve migrating mailboxes to a mail server such as Microsoft Exchange, discussions on migrating mailboxes is not the focus of this white paper.

Migration Made Simple with Seven Easy Pieces

NIIT Technologies' migration methodology enables companies to define the right-fit components and architecture. This methodology helps in migrating entire portfolio of Lotus Notes technology and applications to the Microsoft platform with minimal business disruption.

Prelim Analysis: Taking Stock

The first phase of the migration project involves understanding the current environment. Prelim analysis is performed on the enterprise network with the help of tools to generate an inventory of existing Lotus Notes infrastructure (servers, workstations, etc.) and applications that exist in the enterprise. The tools are also involved in the cleanup job to identify similar databases, system databases, databases that are not used for a long time, etc. It helps in reducing the inventory size.

Tools running on this list analyze each application. After tool-based analysis, various reports are generated related to the size of the application, its usage statistics and structure—for instance, whether it is developed on a standard template or customized template; does it have Web forms or use a workflow? The applications categorized based on these attributes provide suggestions on the target platform. The outcome of this phase is reports that are vital inputs for the next phase.

Analysis: Finding a Common Ground

Analysis phase involves filtering of the application list generated in the prelim analysis phase. Applications are categorized into various groups (e.g., developed on standard templates, workflow similarity, ability to access Web, usage statistics, application complexity, etc.)

Analysts discuss this data with business users and decide to either archive, delete or migrate (with or without functional changes) each of these applications.

Migration Understanding and Setup: Getting the Lay of Land

This phase consists of understanding the application

inventory. A quick round of discussion with IT and business users helps make required changes to the migration set. Business dependencies, dependencies with respect to other systems (mails migration, user migration to Active Directory, etc.) and applications are identified in this phase.

This helps develop the dependency matrix and migration schedule. In this phase, migration development and testing environment are setup with a basic understanding of the production environment.

Pilot Migration: Testing the Waters

This phase acts as a proof of the migration plan. A small representative set of applications is taken up for migration. As these applications are migrated, rough edges in the plan are identified and corrective actions are taken.

Individual App Migration: Setting Sail

This phase involves actual migration, testing, and acceptance of applications. It is suggested to execute this phase in iterations. Migration strategy for each application under migration is decided based upon the analysis result and could involve diverse strategies such as automated migration, migration to SharePoint, custom development and so on.
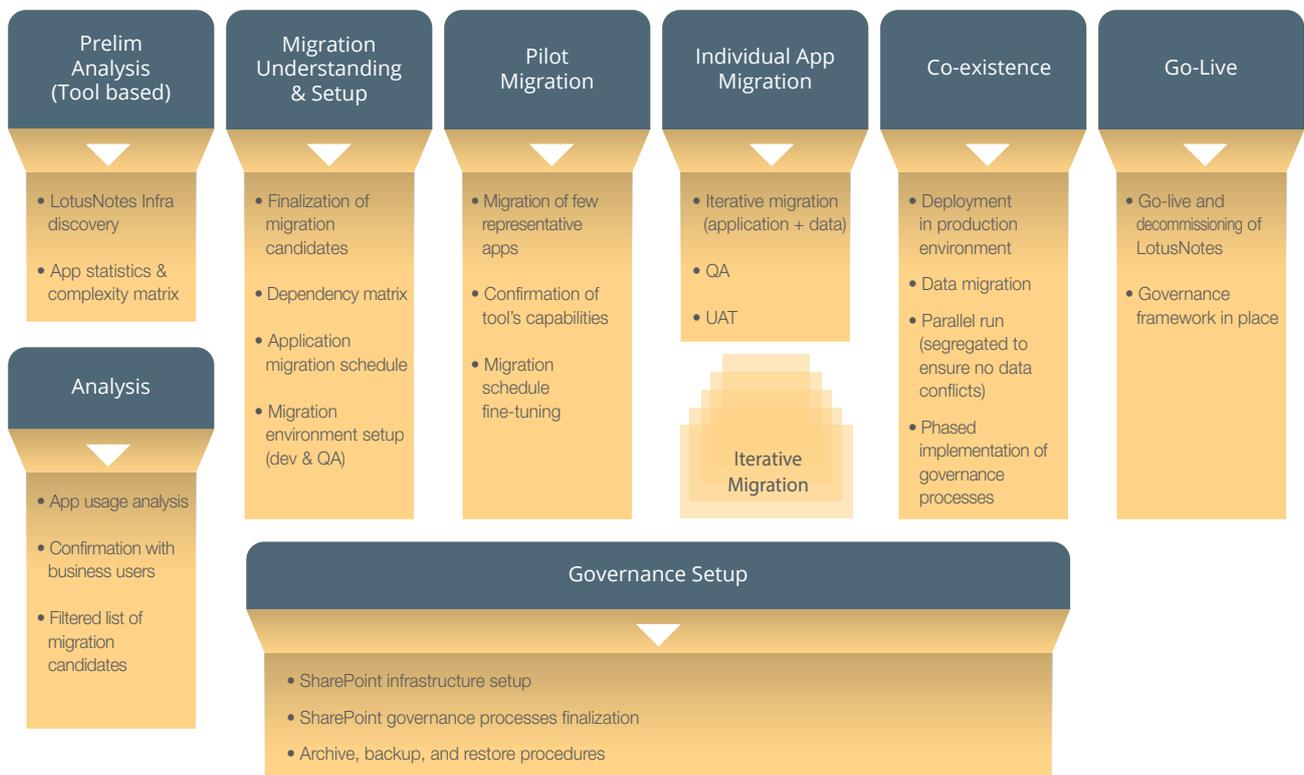
Applications migrated in each iteration are picked based on a specific criteria, and subjected to quality Assurance (QA) and User Acceptance Testing (UAT). After this, the business can decide to move the migrated applications to the next phase.

Coexistence: Settling in with the Elements

This phase involves parallel run of Lotus Notes and migrated applications. Companies should take special care to ensure that the same set of users is not working on both the versions. This can lead to data conflict. The purpose of a parallel run is to ensure that an alternative environment is available for business urgencies during unforeseen hiccups. Parallel run also helps in migrating users to the new environment in a phased manner. In case, the business need requires users to work on any of the environments irrespective of the systems used by them, data must be available on both the systems. Data bridging and sync mechanisms should also be put in place. There are various tools available in the market that can be used for this purpose.

Go-Live: Completing the Migration Voyage

Go-live signifies full production run of the new SharePoint application set and decommissioning of Lotus Notes applications.

Prelim Analysis (Tool based)	Migration Understanding & Setup	Pilot Migration	Individual App Migration	Co-existence	Go-Live
• LotusNotes Infra discovery • App statistics & complexity matrix	• Finalization of migration candidates • Dependency matrix • Application migration schedule • Migration environment setup (dev & QA)	• Migration of few representative apps • Confirmation of tool's capabilities • Migration schedule fine-tuning	• Iterative migration (application + data) • QA • UAT	• Deployment in production environment • Data migration • Parallel run (segregated to ensure no data conflicts) • Phased implementation of governance processes	• Go-live and decommissioning of LotusNotes • Governance framework in place

Analysis

- App usage analysis
- Confirmation with business users
- Filtered list of migration candidates

Iterative Migration

Governance Setup

- SharePoint infrastructure setup
- SharePoint governance processes finalization
- Archive, backup, and restore procedures

Tools of the Migration Trade

There are a number of tools available today that boost no loss during migration from Lotus Notes application to SharePoint. In an endeavor to find the most efficient tools, NIIT Technologies has studied and worked on CASAHL DART product suite, DELL Migrator for Notes to SharePoint and VisiMigrate from Visionet.

CASAHL DART Product Suite

CASAHL DART product suite provides support for the complete lifecycle for migrating and integrating collaborative applications with enterprise data systems.

While DART product suite helps plan, migrate, and integrate Notes application to SharePoint/.Net, it can be used with tools available from Microsoft for migrating mailboxes and effect integration with Notes and AD to provide complete support for migrating from Lotus Notes to Microsoft Exchange and SharePoint.
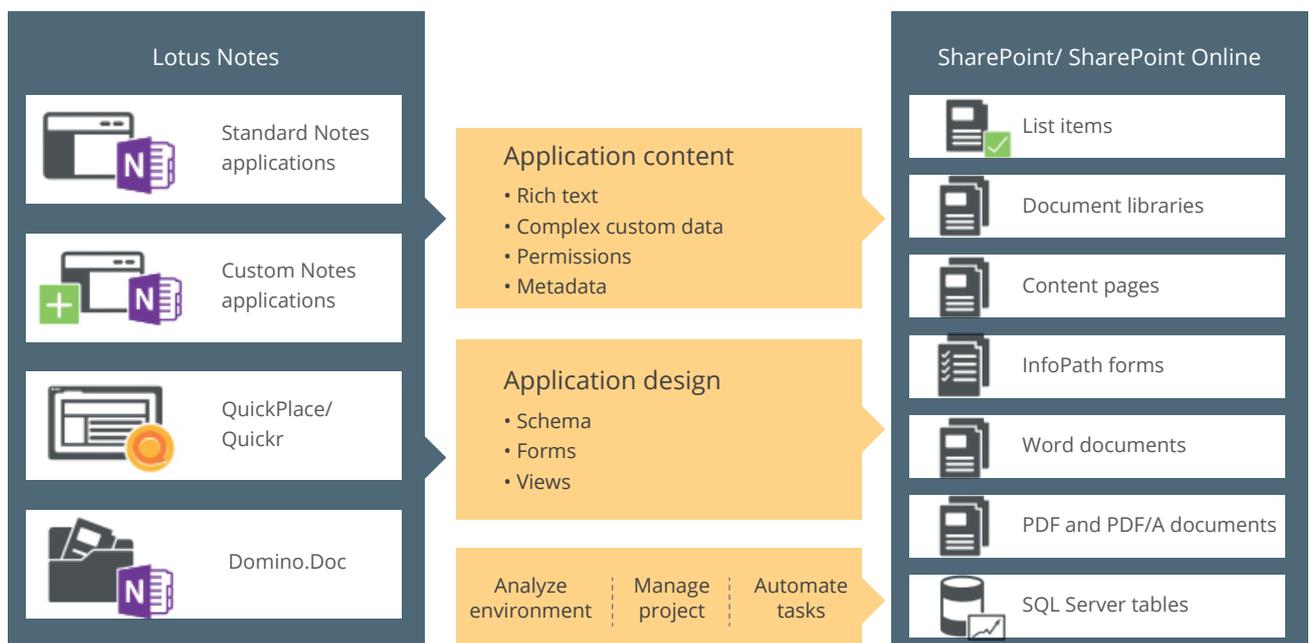
Discovery   Analysis   Rationalization   Transition

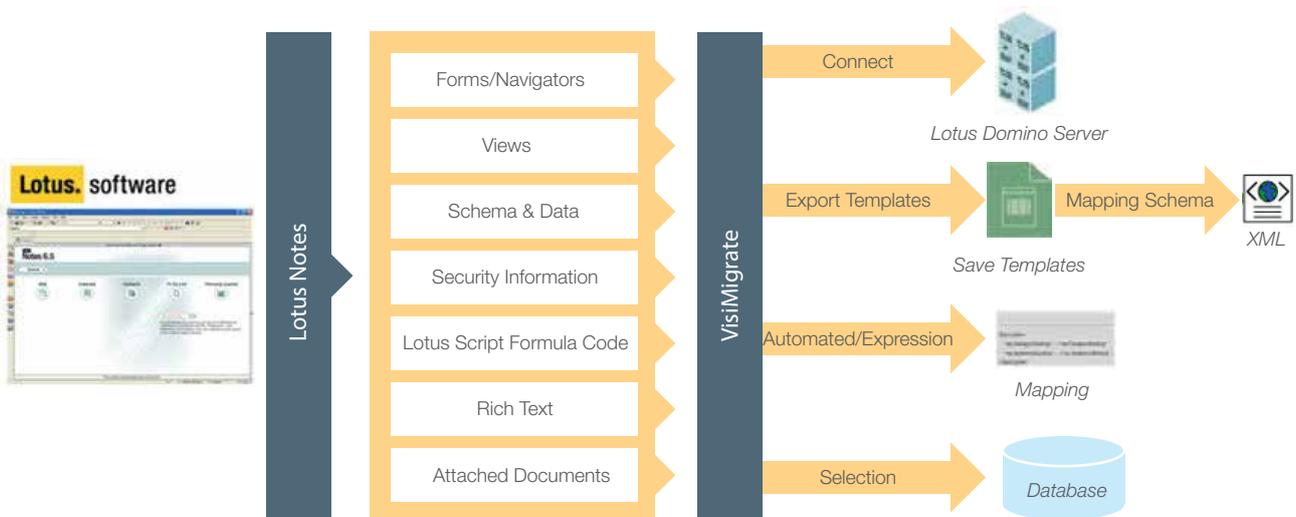| Discovery	Analysis	Rationalization	Transition
Crawler helps collect raw data from the current IT footprint.	Analyzer creates a detailed report of the current deployment, including usage patterns and content characteristics from the raw data.	CASAHL Lifecycle Dashboard brings all the inputs from the Discovery and Analysis phases so transition managers can make the right decisions for the business.	ecKnowledge helps implement transition and migration, while helping to integrate collaboration/content systems with other enterprise resources, including database management systems and enterprise applications.

Dell Migrator for Notes to SharePoint

Migrator for Notes to SharePoint migrates Lotus Notes, QuickPlace/Quickr and Domino.Doc applications to SharePoint 2010/2013, Office 365, and other hosted SharePoint environments. The tool also generates InfoPath documents and performs a number of other useful functions during migration. With an intuitive user interface and easy-to-follow Notes data mapping to SharePoint list, Notes Migrator can be operated by both technical and non-technical users.

Lotus Notes

- Standard Notes applications
- Custom Notes applications
- QuickPlace/ Quickr
- Domino.Doc

Application content
- Rich text
- Complex custom data
- Permissions
- Metadata

Application design
- Schema
- Forms
- Views

Analyze environment   Manage project   Automate tasks

SharePoint/ SharePoint Online
- List items
- Document libraries
- Content pages
- InfoPath forms
- Word documents
- PDF and PDF/A documents
- SQL Server tables

Migrator for Notes to SharePoint can be combined with other tools available from Dell to help migrate mailboxes to Microsoft Exchange and also aid

SharePoint Governance, thus ensuring end-to-end support for migration, integration, and ongoing management of SharePoint Infrastructure.

VisiMigrate from Visionet

By using VisiMigrate, organizations can convert application data before transferring it to SharePoint. The system allows mapping of a single Lotus view to multiple SharePoint lists and vice versa. Multi-threaded application implementation dramatically reduces migration process time as compared to other data migration tools.

VisiMigrate enables organizations to move content from Lotus Notes database files to mapped elements in SharePoint 2010. Information can be transferred as-is or can be converted according to the business requirements using built-in expressions of VisiMigrate. It assures users that no data will be lost during transfer, reducing the deployment time of SharePoint application, and making it cost-effective.

Tools Available for SharePoint Migration

Capability	DART Product Suite	Migrator for Notes to SharePoint	VisiMigrate
Support for Lotus Notes application migration to SharePoint	Excellent	Excellent	Good (support not available for SharePoint 2013)
Support for Pre-analysis and analysis	Excellent	Excellent	Basic support
Support for complete migration lifecycle	Excellent	Good	Basic
LotusNotes, SharePoint, Exchange integration capabilities	Good	Excellent	Not available
Two way data sync	Yes	Yes	Not available
Support for migration to exchange	Need to use Microsoft tools	Other tools available from Dell can be used	Not available
SharePoint governance support	Basic	Other tools available from Dell can be used to provide good support	Basic support is available

The NIIT Technologies Thought Board: Breaking the Migration Barrier

Why are Enterprises Choosing SharePoint as the Platform for Enterprise Collaboration?

Cloud- and mobile-enabled	Simple and intuitive user interface	Enterprise-ready and integrated server capabilities	A variety of information can be consolidated and managed

What are the Key Success Mantras for Migration?

While there are many factors that will influence the program, here are some imperatives to follow during each phase of the migration.

Prelim Analysis	Leverage automated tools for inventory building to speed up the process
Analysis	Ensure that the applications are grouped based on the right parameters e.g. workflow similarity, usage statistics, application complexity
Migration Understanding & Setup	Developing a dependency matrix will help avoid disruption during later states of the migration
Pilot Migration	Choose a heterogeneous set of applications to migrate – these applications should be diverse in functionality
Individual App Migration	Choose iterative migration over a big bang approach, with a well-defined migration strategy for each application
Coexistence	Ensure that the same set of users is not working on both Lotus Notes and SharePoint
Go-Live	Ensure that the governance framework is in place across infrastructure, processes and data

What are the Different Migration Tools Available?

There are many tools to choose from, each offering its own merits. However, NIIT Technologies has leveraged three tools to good effect in various migration programs.

CASAHL DART Product Suite

Provides support for the complete lifecycle of migration and integration

Dell Migrator for Notes to SharePoint

Can be operated by both technical and non-technical users

VisiMigrate from Visionet

Assures users that no data will be lost during transfer, reducing the deployment time and making it cost-effective

Well Begun is Half Done, Well Planned is Well Managed

Migrating from Lotus Notes appears to be a huge challenge, but the benefits like reduction in resource management and increase in productivity vastly outweigh the disadvantages. The risks involved like loss of data, can be completely avoided by planning the migration well, and following the best practices. There are plenty of tools available to help you migrate from Lotus Notes, and you can pick the one that suits your needs after a thorough analysis. Choosing a toolset that supports your needs and infrastructure goes a long way in ensuring the success of the migration effort.

For more information, contact marketing@niit-tech.com

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