

IBM LotusLive™ Notes

Welcome to IBM LotusLive Notes!

This project template has been created to assist IT Project Managers tasked with planning, preparing their environment for and executing a Proof of Concept for IBM LotusLive Notes Hybrid. It assumes the Proof of Concept includes transition of a limited number of existing on-premises Notes users and their data into the LotusLive service. The set of tasks is not intended to be comprehensive; rather this is a set of tasks that are typically considered and expected while planning a Lotus Notes cloud transformation project.

The individual tasks in this template can have a wide variance in elapsed time from one IT environment to the next. A great deal depends on local circumstances such as availability of staff for the project, availability of servers for the project, willingness of end users to participate, and how recently Domino Server and Notes clients have been upgraded. This timeline identifies predecessor task relationships, but does not estimate elapsed time or resources required for each task. Where IBM has observed a great deal of variability in execution, that has been noted.

Because this is a plan for a Proof of Concept, it assumes only one Passthru server is necessary; for long term Production two Pass-thru servers are recommended for redundancy.

This project timeline template also assumes the Proof of Concept requires only one Staging Server, in order to pull down replicas of email files for one batch of users from one Domino Domain. If the participants' on-premises email replicas are hosted in multiple data centers, the best practice is to replicate and consolidate at one data center. Sometimes a Proof of Concept involves multiple batches of data migration; in that case, the tasks on the tabs labeled **Data Transition** and **User Provisioning** would be repeated for each batch.

The IBM Software Services for Lotus team hopes you will find this helpful in planning your IBM LotusLive Notes Proof of Concept.

Assess and Plan

Task	Pred task	LotusLive Notes Hybrid Setup or Data Transition Task	Completion Criteria
1.1		Determine Project Charter and Appoint a Project Manager	Named Project Manager
1.2*	1.1	Assess Line of Business Environmental factors: applications and third party products in use, integrations between products in use, templates, disclaimers, signature files, Line of Business IT requirements	Determination that Line of Business IT needs can be met with a LotusLive Notes solution
1.3*	1.1	Inventory end user's Desktop Notes clients, browsers, and hardware	Inventory of desktop hardware and software, to be used to assess necessary upgrades, if required
1.4	1.1	Inventory Domino Servers – determine what software upgrades will be necessary to meet LotusLive requirements	Inventory, clearly identifying servers to be upgraded
1.5	1.1	Assess needed changes to Directory to support LotusLive Notes Hybrid Requirements	Plan for any necessary Directory changes
1.6	1.1	Assess needed changes to Network to support LotusLive Notes Hybrid Requirements	Plan for any necessary Network changes
1.7	1.1	Assess Corporate Security Policies. Will the corporate policies allow users access to an Internet based Service?	Determination on whether Corporate security policies can be implemented in the Cloud
1.8	1.1	Assess existing mail routing, and the potential need for changes.	Plan for any necessary mail routing changes

Assess and Plan

1.9*	1.2, 1.3, 1.4, 1.5, 1.6, 1.7, 1.8	Conduct Business Feasibility Assessment considering all critical factors.	Determination whether Cloud is a good fit for business needs. If so, Success Criteria for Proof of Concept are documented in writing and Costs estimated.
1.10*	1.9	Inform Internal Help Desk of Proof of Concept; ensure they are ready to support end users during the Notes client and Browser upgrades. Provide training if necessary	Announcement to help desk staff; training provided.
1.11*	1.4, 1.9	If significant Domino Upgrades are necessary, train Domino Administrators on the new version of Domino.	Administrators are up to date on capabilities of Domino 8.5.x, and are ready to participate in upgrades and ongoing maintenance.
1.12*	1.9	Identify Administrators to support the Proof of Concept. Inform them of their roles and responsibilities during the project. . Provide training on LotusLive Administration; ensure they are ready to perform the initial LotusLive setup tasks, and provision end users after transition.	Administrators identified and trained.
1.13*	1.9	Review on-premises Domino Administrative Policies in use, the LotusLive standard Policies, and determine desired policies for LotusLive users. http://www-10.lotus.com/ldd/bhwiki.nsf/dx/Using_administrative_policies_with_LotusLive_Notes_LLN	Policy settings for LotusLive accounts determined.

Assess and Plan

1.14*	1.9	Assess Notes Templates in use on-premises. Decide if the Proof of Concept project should include the application of a customized Notes Template. http://www-10.lotus.com/ldd/bhwiki.nsf/dx/LotusLive_Notes_Template_Validation_Requirements	Decision on whether to create a LotusLive template for this Proof of Concept. If the answer is yes, an ISSL SOW for the evaluation engagement is necessary.
1.15	1.3, 1.9	Determine likely Proof of Concept users. It is a best practice to include 5 to 10 "testdata" users for Administrator and Help Desk practice and training.	Written List of users to be migrated, plan for creating test user accounts
1.16	1.9	Work with IBM Software Services Lotus (ISSL) to create a Statement of Work (SOW) for data transition and/or custom template work. . Sign contract and return to IBM.	Signed SOW returned to IBM
1.17	1.15	Inform likely participants of the upcoming Project, and their participation	Email/vocal announcement communicating Plan
1.18	1.9	Decide how to remove access to the on-premises mail file replicas after transition completes. The choices include: deletion, ACL lockout, moving the files to a place Domino won't find them, and doing nothing at all (NOT recommended)	Decision on what to do with on-premises mail file replicas after end users are successfully transitioned.
1.19	1.9	Plan logistics for hybrid infrastructure implementation	Decision on datacenter site to host hybrid servers and staging server.
1.20	1.9	Determine if any company accounts and subscriptions already exist on LotusLive, and what content is there. Trial accounts may have associated end users with your company domain; these may need to be deleted before proceeding. Support@lotuslive.com can assist with this.	Existing trial/guest accounts (if any) are deleted if necessary.

Assess and Plan

- 1.21 1.9 Contact your preferred courier to inquire how your company can initiate the shipment process both to the IBM datacenter **and back to your company from the IBM datacenter.** ISSL can explain the process and provide the IBM datacenter shipping address. If this will be an international shipment, customs paperwork will be necessary both directions; it is a best practice to include the return customs paperwork in the box when the NAS is shipped to the IBM datacenter.
- Suitable courier chosen; the process for your company to initiate shipments to and from the LotusLive datacenter is clear and can be executed by the courier.

* indicates tasks which vary in elapsed time depending on local circumstances

Environment Preparation

Task	Pred Task	LotusLive Notes Hybrid Setup or Data Transition Task	Completion Criteria
2.1*	1.19	Acquire and Install Hardware and Software for hybrid configuration and data transition (see Hardware Requirements tab). Install Software, place Passthru and Staging Servers on network per instructions.	Staging Server and Passthru server installed and in place. Staging server on internal network; Passthru server on DMZ.
2.2	1.17	Begin required changes to desktops: Notes Standard Client (Basic not supported) and/or Browser (if using LotusLive Notes Web Client)	Upgrade plan in place and execution begins
2.3	1.9	Create 5-10 test users in on-premises environment, with representative size mail files	Test users accounts populated, added to list of email files to migrate
2.4	1.10, 1.15	Provide training on LotusLive Notes to Internal Help Desk Personnel	All Help Desk Personnel confident in answering end user questions about LotusLive functionality
2.5	1.12, 1.16	Kickoff project with ISSL personnel; review planned tasks and schedule	Meeting held; plan ready to execute
2.6*	2.1, 2.5	Provide remote access (VPN) to the staging server to ISSL Practitioner assigned to this engagement. If ISSL is also executing the hybrid setup, provide VPN access to the passthru server as well.	ISSL Practitioner has VPN access instructions, and has verified they work.

Environment Preparation

2.7*	1.4	Upgrade Domino server(s) in directory synchronization and mail routing domains to Domino 8.5.1 Fix Pack 2 or later to support the Hybrid environment integration.	All servers upgraded.
2.8*	1.5	Execute identified necessary changes to Directory to support LotusLive Notes Hybrid Requirements	On-premises Directory meets LotusLive Notes requirements.
2.9*	1.6	Execute identified necessary changes to Network to support LotusLive Notes Hybrid Requirements	On-premises Network meets LotusLive Notes requirements.
2.10*	2.1	Activate LotusLive subscription; perform initial Administrator login and setup.	Login and initial setup completed.
2.11*	2.7, 2.8, 2.9,	Execute Hybrid Configuration Setup of passthru server and LotusLive administrative hybrid configuration	Hybrid Setup tasks successfully completed
2.12	2.11	Verify Correctness of Hybrid Configuration using validation tool in LotusLive Administrator console.	Validation tool verifies correct configuration
2.13	1.16, 2.1, 2.12	Receive shipment of NAS chassis from IBM.	NAS on-premises with Staging Server
2.14	2.13	Mount drives in NAS chassis, connect NAS to staging server.	NAS Mounted
2.15*	2.2	Complete required changes to Desktops: Notes client and/or Browser (if using LotusLive Notes Web Client). All desktops at required levels for LotusLive.	All desktops at required levels of Lotus Notes client/Web Browser or removed from Proof of Concept participant list.

Environment Preparation

2.16	2.2, 2.3, 2.15	Finalize list of end users whose data will be migrated to LotusLive; include test users	Written list of Proof of Concept Participants in one Domino domain
2.17	2.6, 2.14	ISSL configures Staging Server, installs onboarding Tool	Vmware image installed
2.18	1.13, 2.10	Execute LotusLive Notes Policy changes	Desired Group Policies applied
2.19*	1.14, 1.16, 2.10	If a Customized Notes Template is planned for this Proof of Concept, execute the creation and evaluation of the template, per the SOW.	If part of Proof of Concept, Customized Template available for use in LotusLive.

* indicates tasks which vary in elapsed time depending on local circumstances

Data Transition

Task	Pred task	LotusLive Notes Hybrid Setup or Data Transition Task	Completion Criteria
3.1	2.16	Provide Finalized list of end users to ISSL	ISSL has list of email replicas for migration
3.2*	2.16	Provide training on LotusLive to participating End Users on actions they must take to complete the transition. Also train them on differences between the on-premises environment they are used to using and the LotusLive service. For instance, if your users are used to the Notes client and you are going to have them use the LotusLive Notes Web interface, you should train them on that interface.	All participating End Users trained on the actions they need to perform to complete transition, and how to use LotusLive Notes.
3.3	2.16, 2.17	Approve content of end user communication messages on actions to be taken after migration; one message for browser users and one for Notes client users. These will be automatically sent by ISSL onboarding tool.	Approved message content has been given to ISSL.
3.4	2.17, 3.1	ISSL executes the transition process to pull replica copies of user mail files onto the staging server	All email user files replicated onto Staging Server
3.5	3.3, 3.4	When email files have been loaded and validated, ISSL encrypts and copies them onto the NAS device, and notifies your Project Manager of readiness to ship	Notification to ship
3.6	1.21, 3.5	Dismount NAS device; package for shipping. If this is an international shipment, include the return customs forms in the package. With IBM, determine schedule to ship to arrive at IBM data center during business hours.	NAS dismounted; Shipment plan determined

Data Transition

3.7 3.6 Ship NAS using company preferred courier; inform IBM of carrier and tracking number. Tracking number provided to IBM

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User Provisioning

Task	Pred task	LotusLive Notes Hybrid Setup or Data Transition Task	Completion Criteria
4.1	3.7	ISSL receives the NAS Device at the IBM Data Center during business hours; NAS mounted in data center.	NAS mounted
4.2	4.1	ISSL initiates mail file provisioning process. IBM moves the users into the Ready to Provision State.	All users in Ready to Provision State
4.3*	2.4, 4.2	Your Company Administrators Provision end users for LotusLive accounts, starting with test user accounts. Verify test user accounts are working as expected before proceeding to real users.	All users Provisioned
4.4	3.2, 4.3	End users notified (via automated direct email deposit to their existing Inbox) when they have been switched to LotusLive Notes.	Provisioned users notified their new email is in LotusLive
4.5*	4.4	Lotus Notes client users will click a link in the communication they receive to download and run the desktop configuration tool (Config.nsf) to modify their Lotus Notes client settings and perform a one-time catch up replication between their on-premises server and new LotusLive Notes server.	All Notes client users have run the desktop configuration tool
4.6*	4.4	LotusLive Notes users only accessing the service via browser will click a link to login to Lotuslive; the Staging Server will automatically replicate their on-premises replica to their LotusLive Notes server, for the one-time catch up.	All LotusLive Notes Web users have clicked on the link

User Provisioning

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| 4.7 | 1.18,
4.5/4.6 | After two (2) days of steady state usage, request your IT department take actions to remove access to on-premises mail replicas for the transitioned users. | On-premises replicas handled as decided during the planning process. |
| 4.8 | 1.21,
4.7 | When all users are in transition completed state, request IBM dismount the NAS and prepare for return shipment using preferred courier. For international shipments, if the return customs paperwork was not included in the original shipment, this must be provided to IBM to prepare the package for return shipment. | NAS Dismounted and prepared for shipment. All required shipment paperwork and pickup information shared with IBM. |
| 4.9 | 4.8 | Arrange with your preferred courier to pick up package; provide IBM necessary information so package will be ready for pickup | NAS returned to staging server site, ready for re-use |

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Hardware Requirements

Hardware to Acquire and Install

Staging Server running ESXi Virtual Machine V4.0 or later (Dual Core Intel /AMD CPU, 4 GB Physical RAM minimum, 2x Gigabit Ethernet network ports, Disk space to hold one batch of email files) This machine should be located on the internal network and have replica access for all email files to be transitioned; it should be registered under the existing certificate hierarchy in a group that will allow the IBM Staging Server software to issue remote console commands to all Domino mail servers on which user mail files reside.

Passthru Server, running Domino 8.5.2. This machine should be located in the DMZ network zone. If you are planning a production deployment, you should prepare two Passthru Servers for high availability.

NAS and NAS drives - Contact IBM Software Services for Lotus for the specification for what will be supplied/required