



Welcome to IBM SmartCloud Notes!

This project template has been created to assist IT Project Managers tasked with planning and executing a Proof of Concept for IBM SmartCloud Notes Hybrid. Typically, the Proof of Concept includes transition of a limited number of existing on-premises Notes users into the SmartCloud service with data migration. The proof of concept can easily become a full production deployment, as these are also the base tasks typically executed during a full SmartCloud 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, 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. It also assumes that the transfers are executed by FTP. Physical media options are available for IBM's US and Europe SmartCloud data centers.

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 Collaboration team hopes you will find this helpful in planning your IBM SmartCloud Notes Proof of Concept.

Assess and Plan

Pred task	SmartCloud Notes Hybrid Setup or Data Transition Task	Completion Criteria
1.1	Determine Project Charter and Appoint a Project Manager. Start Procurement of subscriptions for SmartCloud.	Named Project Manager. Subscription procurement in process.
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	Initial determination that Line of Business IT needs can be met with a SmartCloud 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 Assess extent of desktop changes needed, if Notes clients or web browsers are not at version levels required for Smartcloud. Identify whether local replicas/MMR's in use. Identify extent of Notes/Domino applications in use.	Initial assessment completed; information gathered to inform end user client decision for SmartCloud.
1.5	1.1 Inventory Domino Servers – determine what software upgrades will be necessary to meet SmartCloud Notes requirements	Inventory, clearly identifying servers to be upgraded
1.5	1.1 Assess needed changes to Directory to support SmartCloud Notes Hybrid Requirements	Plan for any necessary Directory changes
1.7	1.1 Assess needed changes to Network to support SmartCloud Notes Hybrid Requirements	Plan for any necessary Network changes
1.8	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
1.9	1.1 Assess existing mail routing, and the potential need for changes.	Plan for any necessary mail routing changes

Assess and Plan

1.10*	1.2,1.3, 1.5,1.6, 1.7,1.8, 1.9	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.
1.11*	1.10_	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.
1.12*	1.5, 1.10	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.
1.13*	1.10_	Identify Administrators to support the Proof of Concept. Inform them of their roles and responsibilities during the project. Provide training on SmartCloud Notes Administration; ensure they are ready to perform the initial SmartCloud Notes setup tasks, and provision end users after transition.	Administrators identified and trained.
1.14*	1.10_	Review on-premises Domino Administrative Policies in use, the SmartCloud Notes standard Policies, and determine desired policies for SmartCloud Notes users. https://ibm.biz/BdRqjg	Policy settings for SmartCloud accounts determined.

Assess and Plan

1.15*	1.10_	Assess Notes Templates in use on-premises. Decide if the Proof of Concept project should include the application of a customized Notes Template. IBM highly recommends a Custom template to keep a System Administrator group on migrated replica ACL's. http://www-10.lotus.com/ldd/bhwiki.nsf/dx/LotusLive_Notes_Template_Validation_Requirements	Decision on whether to create a Notes template for this Proof of Concept. If the answer is yes, an ISSC SOW for the evaluation engagement is necessary.
1.16	1.3, 1.10	Determine likely Proof of Concept users. It is a best practice to create several fake test users for Administrator and Help Desk practice and training.	Written List of users to be migrated, plan for creating test user accounts.
1.17	1.10_	Work with IBM Software Services for Collaboration (ISSC) or chosen certified Services partner to create a Statement of Work (SOW) for data transition. If a custom template is to be used, an SOW with IBM is required.	Signed SOW(s) returned to IBM/Services partner
1.18	1.16	Inform likely participants of the upcoming Project, and their participation	Email/vocal announcement communicating Plan
1.19	1.10_	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.
1.20_	1.10_	Plan logistics for hybrid infrastructure implementation. Servers can be private cloud servers to speed procurement; hybrid servers are a permanent part of the pilot solution.	Decision on datacenter site to host hybrid servers and staging server.
1.21	1.10_	Determine if any company email accounts already exist on SmartCloud, and if so what content is there. Users may have accounts in IBM Greenhouse. Or users may have opened trial accounts using their production email accounts. Since an email address can only be in ONE organization in SmartCloud, these may need to be deleted or renamed before proceeding. Support@collabserv.com can assist with this.	Existing trial/guest accounts (if any) are deleted or renamed before users participate in Proof of Concept.

Assess and Plan

1.22	1.10_	Choose FTP client for physical transfer of encrypted replicas to IBM datacenter. Many IBM clients use Filezilla. If company policies dictate a different FTP client be used, it must support implicit SSL/TLS over FTP, passive data transfer, and SSL session reuse.	FTP client chosen.
1.22 - alt	1.10_	If legal requirements mandate a physical transport device, 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. ISSC 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 physical media is shipped to the IBM datacenter.	Suitable courier chosen; the process for your company to initiate shipments to and from the SmartCloud Notes 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	SmartCloud Notes Hybrid Setup or Data Transition Task	Completion Criteria
2.1*	1.2	SmartCloud Subscriptions acquired, and initial company account login by Company SmartCloud Administrator complete. Acquire and Install Hardware and Software for hybrid configuration and data transition (see Server Requirements tab). Install Software, place Passthru and Staging Servers on network per instructions.	Company SmartCloud Account in place. Staging Server and Passthru server installed and in place. Staging server on internal network; Passthru server on DMZ.
2.2	1.18	Begin required changes to desktops: Notes Standard Client (Basic not supported) and/or Browser (if using SmartCloud Notes Web Client)	Upgrade plan in place and execution begins
2.3	1.1	Create several test users in on-premises environment, with representative size mail files. Test users should reflect both web client users and Notes users, if both client types are in use.	Test users accounts populated.
2.4	1.13, 1.17, 2.1	Kickoff project with Services personnel; review planned tasks and schedule. Local Administrator(s) trained to use IBM's Onboarding Planning tool (OPT).	Meeting held; plan reviewed, all parties ready to execute
2.5	2.3, 2.4	Use IBM's On-boarding Planning Tool (OPT) to quality check all replicas planned for transition, including test users. Make any necessary changes identified by OPT to ACL's, delegates, attach notes.id for web only users, etc...	Replicas to be transitioned during the Proof of Concept pass OPT readiness quality checks.

Environment Preparation

2.6	1.11, 1.16	Provide training on SmartCloud Notes to Internal Help Desk Personnel	All Help Desk Personnel confident in answering end user questions about SmartCloud Notes functionality
2.7	2.4, 1.15	Create custom template and submit for review and upload, per iSSC instructions. Overview of process here: http://ibm.biz/BdRqDn This is optional, but highly recommended.	Custom template created and submitted for IBM review.
2.8*	2.1,2.4	Provide remote access (VPN) to the staging server to Services Practitioner assigned to this engagement. If Services is also executing the hybrid setup, provide VPN access to the passthru server as well.	Services Practitioner has VPN access instructions, and has verified they work.
2.9*	1.5	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.
2.10*	1.6	Execute identified necessary changes to Directory to support SmartCloud Notes Hybrid Requirements	On-premises Directory meets SmartCloud Notes requirements.
2.11*	1.7	Execute identified necessary changes to Network to support SmartCloud Notes Hybrid Requirements	On-premises Network meets SmartCloud Notes requirements.
2.12*	2.1	Activate SmartCloud subscription; perform initial Administrator login and setup.	Login and initial setup completed.
2.13*	2.8, 2.9, 2.10, 2.11, 2.12	Execute Hybrid Configuration Setup of passthru server and SmartCloud Notes administrative hybrid configuration	Hybrid Setup tasks successfully completed

Environment Preparation

2.14	2.13	Verify Correctness of Hybrid Configuration using validation tool in SmartCloud Notes Administrator console.	Validation tool verifies correct configuration
2.15	2.1, 2.8	Install of Staging Server image, firewall ports open for internet access	Staging Server is setup
2.16	1.22, 2.15	Install FTP client on staging server	FTP transport mechanism available
2.17*	2.2	Complete required changes to Desktops: Notes client and/or Browser (if using SmartCloud Notes Web Client). All desktops at required version levels.	All desktops at required levels of Lotus Notes client and/or Web Browser or removed from Proof of Concept participant list.
2.18	2.2, 2.3, 2.17	Finalize list of end users whose data will be migrated to SmartCloud; include test users. Users should all be from one Domino domain. Run the IBM Onboarding Planning Tool (OPT) over these users remediate identified problems, and identify client type after migration (Notes or Web). Place users into two batches; a first small batch containing the test users, and if desired a few production users; and a second larger batch. Designate the batches in OPT as Ready for Transfer. If mobile is part of the proof of concept, plan for test of mobile as well.	Onboarding Planning Tool verifies Proof of Concept Participants replicas are ready for migration to cloud. Users defined in OPT in two batches and marked as Ready for Transfer.
2.19	1.14, 2.11	Execute SmartCloud Notes Policy changes. Deploying Managed Mail Replicas (MMR) via policy prior to migration is highly recommended.	Desired Group Policies applied

Environment Preparation

2.20*	1.15, 1.17, 2.8, 2.13	If a Customized Notes Template is planned for this Proof of Concept, confirm template has been uploaded by IBM, per the SOW.	If part of Proof of Concept, Customized Template is uploaded and available for use in SmartCloud Notes. This can be verified in the Custom Template area of the SmartCloud Administrator tool.
2.21	2.3, 2.15, 2.18 2.19, 2.20	Service provider stages all replicas listed in the batch list. Once these are successfully replicated and pass quality checks, your service provider creates and encrypts the FTP batch	Initial batch is staged and ready for transfer.
2.22	2.21	Depending on what is specified in the SOW, either you or your services provider FTP's the batch to the Import Server at the IBM data center.	First batch is ready for Import at the IBM data center.
2.23	2.22	Service Provider imports the batch, moves all accounts in the batch to Ready to Provision state.	First batch accounts in Ready to Provision state
2.24	2.23	Provision batch test accounts; verify catch up replication process and delivery of welcome message. Verify can login to the service as test user and configure a Notes client as test user. It is highly recommended to use the test account onboarding process to capture screen shots to document the process for end users – both web client and Notes client users.	Test accounts successfully transitioned into the service; network access verified. Screen shots of user process captured.

Environment Preparation

2.25	2.24	Create end user documentation, describing the steps the end users need to take to complete transition into the service. Incorporate the screen shots.	End user documentation is drafted
2.26	2.15, 2.24	Approve content of all end user communication messages sent by automated tooling: welcome messages and folder monitoring messages. These will be automatically sent by the IBM onboarding tools.	Approved message content has been given to Services Practitioner, and loaded on staging server for agent delivery.
2.27	2.26	If any production users are in the first batch, provision them after the test accounts are verified. Ask these users to verify end user documentation drafts, and make modifications if problems are identified.	First production users, if any, are provisioned into the service. End User communications finalized.

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

Data Transition

Task	Pred task	SmartCloud Notes Hybrid Setup or Data Transition Task	Completion Criteria
3.1	2.18	Using the IBM Onboarding Planning Tool (OPT), identify list of end users to be migrated, remediate any identified problems, name the users in a batch, and designate the batch as "Ready for Transfer" in OPT. Inform Services Provider that batch is ready for processing.	Service Provider has batch of users identified as Ready for Transfer.
3.2*	2.26, 3.1	Inform participating End Users of upcoming transition date, and upcoming changes to email access. Give users chance to request alternative transfer date. Provide training and/or documentation on SmartCloud Notes, per local norms for IT changes.	All participating End Users aware of upcoming transition and agree timing is acceptable (especially important for mobile users).
3.3*	3.1	Services Practioner executes the transition process to pull replica copies of user mail files onto the staging server	All email user files replicated onto Staging Server
3.4	3.2, 3.3	When email files have been loaded and validated, Services Provider encrypts the batch and loads into FTP client area.	Batch ready for transport
3.5	3.4	Depending on your SOW, either you or your service provider ftp's the batch onto the IBM FTP server.	Batch on IBM FTP server.
3.6	3.5	Service Provider initiates mail file import process. IBM service indicates the users are in the Ready to Provision State.	All users in Ready to Provision State

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User Provisioning

Task	Pred task	SmartCloud Notes Hybrid Setup or Data Transition Task	Completion Criteria
4.1	3.6	Remind current on-premise users of their imminent transition into the service. Current web only users may need welcome message in advance.	Users informed of scheduled transition.
4.2*	4.1	On date communicated to end users, Company SmartCloud Administrator Provisions end users for SmartCloud accounts. IBM recommends this be performed when end users will not be actively working, as this allows welcome message delivery and catch up replication to finish overnight.	All users Provisioned
4.3	4.2	Notes client end users are notified (via automated direct email deposit to their existing Inbox) when they have been transitioned to SmartCloud Notes. Services provider can verify delivery of this welcome message.	Provisioned users notified their new email is in SmartCloud
4.4	4.3	Lotus Notes client users will click a link in the welcome communication they receive to login to the SmartCloud Web interface. Notes client users download and run the desktop configuration tool (liveconfig.nsf) to modify their Lotus Notes client settings. If the server to server catch up replication did not complete overnight, liveconfig.nsf also performs a one-time catch up replication between their on-premises server and new SmartCloud Notes server.	All provisioned Notes client users have logged into SmartCloud Notes web and are Active. Notes client users have run the desktop configuration tool.

User Provisioning

4.5*	4.4	Notes web users login to SmartCloud Notes as previously instructed.	All provisioned web only users have logged into SmartCloud Notes web and are Active. Notes client users have run the desktop configuration tool.
4.6	4.4,4.5	Your SmartCloud Administrator verifies transition completion.	All Provisioned users are in Completed state
4.7	1.19, 4.4, 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.

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Server Requirements

Servers to Acquire and Install -- all servers can be private cloud servers to speed procurement. Passthru and Directory synch servers are a permanent part of the solution. The Staging server is only used for data migration.

Staging Server: if IBM is your services provider, ISSC may request that this machine run 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 at least one batch of email files. IBM recommends 2 TB, though can be less. 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.

Directory Server: Can use an existing Domino Server in the on-premises hub domain, or install a new server. Minimum version is Domino 8.5.1 FP2. See: <https://ibm.biz/BdRq2v> for configuration requirements. If you are planning a production deployment, you should prepare two directory servers for high availability.

Physical Media for transport - If your business requires physical media for replica transport, contact IBM Software Services for Collaboration for the specification for what is required and what IBM supplies.