

Quick Reference: Lotus Notes 8.5.1 Upgrade & Deployment Phases w/ Options

This list shows key elements and options of a Notes upgrade and deployment. For details on recommended options, see the "Deploying Notes 8.5.1 clients" page of the [Upgrade Cookbook](http://www.lotus.com/idd/dominowiki.nsf/dx/UC1_TableofContents.htm) (http://www.lotus.com/idd/dominowiki.nsf/dx/UC1_TableofContents.htm)

PHASE 1: Plan the Deployment

<input type="checkbox"/> Choose Install type	<input type="checkbox"/> New Install <input type="checkbox"/> Upgrade <input type="checkbox"/> Migration
<input type="checkbox"/> Choose Installer	<input type="checkbox"/> Multi-user <input type="checkbox"/> All Client <input type="checkbox"/> National Language Version <input type="checkbox"/> Multilingual Install (MUI) Pack <input type="checkbox"/> Fix Pack
<input type="checkbox"/> Choose Install utility	<input type="checkbox"/> Seamless mail upgrade <input type="checkbox"/> Admin install for locked-down desktops <input type="checkbox"/> Pre/post tool
<input type="checkbox"/> Identify needed migration steps	<input type="checkbox"/> Change Notes program directory (will require new install vs. upgrade) <input type="checkbox"/> Migrate single-user installations to multi-user installations
<input type="checkbox"/> Identify server dependencies	<input type="checkbox"/> Determine components that must be configured first on server to benefit clients

PHASE 2: Download & Customize Install Kit

<input type="checkbox"/> Download and customize Installer	<input type="checkbox"/> Remove applications <input type="checkbox"/> Add applications <input type="checkbox"/> Hide/show Install panels <input type="checkbox"/> Configure standardized settings
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PHASE 3: Build & Test Deployment Package

<input type="checkbox"/> Build in automation wherever possible	<input type="checkbox"/> Smart Upgrade or other 3rd-party push tools
<input type="checkbox"/> Enable logging	<input type="checkbox"/> Add parameters for verbose install logging
<input type="checkbox"/> Build in clean-up tasks	<input type="checkbox"/> Uninstall client (recommended, not required) <input type="checkbox"/> Defragment workstation (before and after install) <input type="checkbox"/> Run maintenance on local system databases
<input type="checkbox"/> Build in scripting to perform tasks	<input type="checkbox"/> Shut down Notes (if running) <input type="checkbox"/> Reboot machine
<input type="checkbox"/> Build in anti-virus check	<input type="checkbox"/> Make sure Installer is not impacted by anti-virus settings as configured on desktops

PHASE 4: Pilot the Upgraded Client

<input type="checkbox"/> Pilot deployment roll out	<input type="checkbox"/> Enable Automatic Diagnostic Collection (ADC) fault reporting <input type="checkbox"/> Perform tasks listed in "Phase 5: Roll Out Deployment" for pilot participants <input type="checkbox"/> Confirm custom applications work with new release <input type="checkbox"/> Run a steady state environment for at least 1 month <input type="checkbox"/> Collect, review, and compare pilot feedback against success criteria <input type="checkbox"/> Review and update procedures as necessary
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PHASE 5: Roll Out Deployment

<input type="checkbox"/> Deliver Install kit	<input type="checkbox"/> Automated (Smart Upgrade, SMS Installer, ADT) <input type="checkbox"/> Semi-Automated (Upgrade-by-email) <input type="checkbox"/> Manual (Host Install kit on file share or Distribute Install kit on CD/DVD) <input type="checkbox"/> Image desktop (Pre-configured Notes client on corporate desktop image)
<input type="checkbox"/> Run Installer	<input type="checkbox"/> Silent (via MSI command setup response script) <input type="checkbox"/> GUI
<input type="checkbox"/> Run Notes	<input type="checkbox"/> Initial setup [Configure seamless setup for initial installs] <input type="checkbox"/> Upgrade <input type="checkbox"/> Migration scripting [Pre/Post tool]
<input type="checkbox"/> Log into Notes	<input type="checkbox"/> Upgrade: Login using local ID <input type="checkbox"/> New Install: Login using ID fetched from ID Vault or another location
<input type="checkbox"/> Fetch user settings & personal data	<input type="checkbox"/> Roaming User data fetch <input type="checkbox"/> Manual backup restoration

PHASE 6: Manage the Desktops

<input type="checkbox"/> Apply the latest Fix Pack	<input type="checkbox"/> Download latest Fix Pack and repeat tasks in Phases 1 – 5.
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(Updated February 3, 2010)