10 STEPS TO A SUCCESFUL LOTUS NOTES MIGRATION
CONCENTRATE ON THE ESSENTIALS, SAVE TIME AND MONEY AND AVOID FRUSTRATION!

STEP 1:
AUTOMATIC SCAN AND ANALYSIS OF YOUR EXISTING NOTES INVENTORY (WITH THE HELP OF A TOOL)

a. Set **scan parameters** (date range, user activity thresholds)

b. Scan **Notes database user activity** simultaneously across all servers

c. Scan **Notes content databases** in parallel across all servers

d. Analysis of the **scan output**

STEP 2:
AUTOMATICALLY ASSIGN TARGETS FOR DECOMMISSIONING (USING A TOOL WITH BUILT-IN ALGORITHMS)

a. **Archive** – Content that has been accessed but **not** modified

b. **Replace** – Content that has been accessed **and** modified

c. **Delete** – Content that has **neither** been read **nor** changed

STEP 3:
DISMANTLING DUPLICATES OF DUPLICATED DATABASES (AUTOMATED ASSIGNMENT OF THE „WINNER")

a. Identify replicas among the scanned databases

b. Determine the **"winners"** based on the intensity of user activity

STEP 4:
PERFORM DESIGN SCAN FOR „REPLACE" CATEGORY (HELPS DETERMINE MIGRATION DEPTH AND TARGET PLATFORM)

a. Determine the type of database:

    i. Document-based (Teamrooms/Doclibs)

    ii. (Simple) workflow-based

    iii. Complex business applications

STEP 5:
CREATE A MASTER FILE (AUTOMATED)

a. A single, consolidated Excel overview of all databases with scan/analysis details and targets

STEP 6:
CONTACT THE DATABASE OWNERS TO VERIFY THE RESULT

a. Create **top 5** users found during scan

b. Send an **email survey** with scan/analysis parameters (using the built-in tool)

STEP 7:
CUSTOMISE THE MASTER FILE

    a.   Adjust the assigned targets based on feedback from the database owners

STEP 8:
CHANGE ACL (AUTOMATED)

    a.   Close ACL for the "Delete" category

    b.   Set ACL for the "Archive" category to read-only

    c.   You can undo all changes if necessary (one mouse click)

STEP 9:
FINALISE THE SCOPE OF THE DECOMMISSIONING/MIGRATION PROJECT

    a.   Allocate budget

    b.   Define roles and responsibilities (project owner)

STEP 10:
START NOTES DECOMMISSIONING/MIGRATION

    a.   **Close** databases that are not used (can be deleted at a later date)

    b.   **Outsource** databases that are read-only (e.g. HTML to SharePoint or PDF to Box/Google)

    c.   **Replace** databases:

        i.   Determine if **content** needs to be migrated

          »   Try to archive as much as possible and start with a blank new application

        ii.   Determine the **target platform**:

            a.   Document-oriented databases – SharePoint/Shareflex

            b.   Workflow databases – Sharepoint/Shareflex or Power Automate (low code)

            c.   Business critical/complex applications – In-house or off-the-shelve software (ERP; CRM- or custom development)

Typically, a Lotus Notes migration is a one-off and quite time-consuming affair. The steps mentioned here are based on the **Notes Domino Decommissioning Method (NDDM)** from our partner Lialis. This multi-step approach to de-commissioning and migrating IBM Domino and Notes application environments has proven successful in numerous projects. With the **Domino Server Application Scanner**, Lialis also provides a unique tool on the market that performs both a usage and a content scan.

If you too would like to save costs, time and hassle when migrating from Lotus Notes to, for example, Microsoft 365, please contact us. We will be happy to assist and consult you!

Contact: Portal Systems AG | Frank von Orlikowski, CEO and Sales – info@portalsystems.de

www.portalsystems.de/en