

Migrating from Notes to force.com

Considerations





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For any organisation that adopted Lotus Notes over the past two decades, there will be hundreds if not thousands of applications that have been developed by a wide variety of people and teams. Often the knowledge behind the people and processes touched by the application has long since left the company and modifications to the application are avoided in case it “breaks”

In parallel over the intervening years companies have adopted new platforms and technologies that ideally they would like to move these Notes applications to. Cloud based technologies have become increasingly popular, with Salesforce and its application development platform force.com experiencing breathtaking growth over the past number of years.

The team at the Bluewave Technology Group has over 20 years experience in the implementation and development on the Lotus Notes platform. We also have vast experience in assisting our client migrate to alternative platforms. As a Salesforce.com Cloud. Alliance Partner we are perfectly placed to assist in the migration of Notes applications to the force.com platform.

This document outlines considerations for a successful Notes to force.com migration.

Common Challenges with Domino

There can be a variety of reasons that organisations look to migrate their Notes applications. Common challenges that companies can experience include..

- Internal expertise no longer available
- Application knowledge not available
- Drive to reduce development platforms used and consolidate on fewer platforms
- Push to move the applications to the cloud

Whatever the reason, there are a number of best practices to be adhered to, to ensure that the migration is successful and least disruptive to the users.





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What Applications

One of the first exercises to undertake is to evaluate what applications need to be migrated. A starting point here is to report on usage. Clearly applications that are not being accessed by the user community are potentially applications that need no further work. There are many tools available that will deliver metrics on usage, including one by Bluewave Technology Ltd, simply mail migrationtotheforce@bluewavegroup.eu for further details.

This will lead to a list of applications that potentially may need to be migrated. An important step at this point is to understand their usage. This requires dialogue with the application users. Again tools are available to determine the “power users” of the application and these users can normally assist you to understand the importance of the application. Typically applications that are being used fit into one of the following categories

- In Use but winding down to retirement
- In Use on a limited basis
- In Use by an active user base

Clearly applications that fit into the latter 2 points can be considered for migration. It is vital at this point that application owners are engaged, mere metrics on usage will not always provide the full picture on the importance or otherwise of the application.

At this point reasons that will push the application to a migration will include..

The application is active and changing all the time

In this instance given the rapid application development nature of force.com the application is a strong candidate for migration as changes will be required going forward and a platform with a long-term future within the organisation is required.

The application is active, but requires little modification on an annual basis.

This application is a candidate for migration, generally because it is here to stay and ultimately if Notes is being retired, an alternative will be required.





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Complexity

So you've highlighted the applications that need to be migrated, or at least are candidates for migration and need to consider the next steps.

Naturally a consideration at this point is to understand, how much work is involved to migrate the application. This allows you measure the cost and effort V the return on the investment. Key considerations to determine complexity include

- How much Data is there
- How many fields are there and of what type (i.e. Reader, Author, Rich Text)
- How engrained is the logic (LotusScript / Java Agents, LotusScript behind fields etc..)
- The number of forms and subforms in use
- Do they integrate with other platforms via connectors

Consideration to the above points allows you to assign a score to the application, which ultimately will allow you start to cost the effort involved to migrate. From a complexity perspective the applications can be categorized as follows.

Standard Template Applications

Of course these are the easiest of them all. They have been derived for the Standard Templates that ship with notes and assuming no modifications have been made, the migration can be automated with little interaction needed.

Standard Templates (Modified)

Certain applications based on standard templates have had some customisation made to them. Again we can help asses these applications for changes using some of our tools, simply mail migrationtotheforce@bluewavegroup.eu for further details. Once the modifications have been highlighted its simply a case of automating the migration using the standard template and implementing the customisations on the force.com platform.

Custom Applications No Significant Logic

The application has a number of customised forms and views, however is mainly sued for data capture and display. There is no logic, mainly simple validation





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Custom Applications light Scripting and validation

The application has a large number of customised forms and views and a small amount of workflow, agents and validation.

Custom Application heavy logic

This is a fully customized application that has significant workflow and logic built in. Typically these applications have grown over time.

Having determined which complexity category your application fits into, you need to identify the key design components that make up the application. There are two ways to achieve this.

Engage the application owner to understand the components of the applications such as.

- Forms
- Views
- Workflows
- Agents
- Script Libraries

Quite often the application owner will not understand the system architecture, but from this engagement you can match functionality to underlying design components

Use of 3rd party tools is vital to get a clear audit of the application, highlighting all key design components and allowing you to search for specific design patterns. Bluewave Technology Ltd as a partner of Teamstudio use their “Analyser” tool for this process.

Inventory





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Having decided upon the application and performed an audit of the application, a design document and matrix is produced. The metrics can be used to map the component in Notes to its corresponding component in force.com. Forms and views as well as custom fields are easily done and the process can be automated using the eclipse IDE for force.com. Key workflows can also be easily implemented. The challenge here is understanding the actual workflow rather than the implementation of same.

Notes Design Component	Force.com Design Component
Form	Object
Fields	Standard & Custom
Views	Views
Agents	Apex Trigger
Workflow	Workflow & Approvals
Formula	Simple & Advanced Formula
Lotusscript	Apex

Migrating Data

There are two options here.

- Migrate all existing data
- Leave old system accessible for a period of time until data can be archived.

Migration of data to salesforce can be managed by the DataLoader utility, once the data has been formatted to a specific format e.g. .csv. Agents can be written to perform the original output, or on-premise tools such as Notrix or LEI can speed up the process.

About Bluewave Technology Ltd

Bluewave Technology Ltd are a Premium IBM Business Partner and Salesforce Cloud Alliance Partner. Our team consists of both certified force.com developers and administrators as well as certified Domino developers and administrators. Many are dual certified on both platforms, placing us in a unique position to assist companies when considering migrating their applications from Domino to Salesforce.

