



# Implementing an Enterprise GroupWise 5.5 Document Management System

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Conyers, Dill & Pearman



**BrainShare 2000**

**Novell.**

# Agenda

- The Need for Document Management System (DMS)
- Conyers, Dill & Pearman
  - The Firm
  - The Challenge
- Avanti Network Systems
  - Six Steps to Migration
- Connectivity Infrastructure
- GroupWise Component Configuration
- Results

# The Need for DMS— Document Volume

- Without DMS
  - Documents are stored “at the user’s convenience”
    - Local drive, home directory, shared volume
  - No one is in charge of document population
  - No real plan for cleanup/archive
    - Backups take longer



# The Need for DMS— Document Volume

- With DMS
  - Documents are stored according to storage protocol
  - Administration sets criteria for document life and disposition
  - Documents are backed up, archived, deleted or retained by plan
    - Backups are done routinely

# The Need for DMS— Rapid Access

- Without DMS
  - No storage or retrieval protocol
  - Searches depend on user memory or “guesses”
  - Over 30% of searches are completely unsuccessful resulting in document re-creation



# The Need for DMS— Rapid Access

- With DMS
  - Documents are categorized and indexed in a database
  - DMS search result times of more than 5 seconds are considered *LONG*



# The Need for DMS— Ease of Use

- Without DMS
  - Users save documents based on unenforceable criteria
    - Location and name
  - What makes sense to one user, may make no sense to that same user in two months
  - Retrievals are haphazard at best

# The Need for DMS— Ease of Use

- With DMS
  - Users spend about the same time in document naming/classification
    - Profile/property sheet
  - Retrieval based on document information or content





# Conyers, Dill and Pearman— The Firm

- Six offices

- Bermuda (Hamilton)
- British Virgin Islands (Road Town)
- Cayman Islands (George Town)
- Guernsey (St. Peter Port)
- London
- Hong Kong



# Conyers, Dill and Pearman

- Advises clients on company and commercial law
- Sixteen NetWare servers
- Technical support staff of three based in Bermuda
- 330 Users

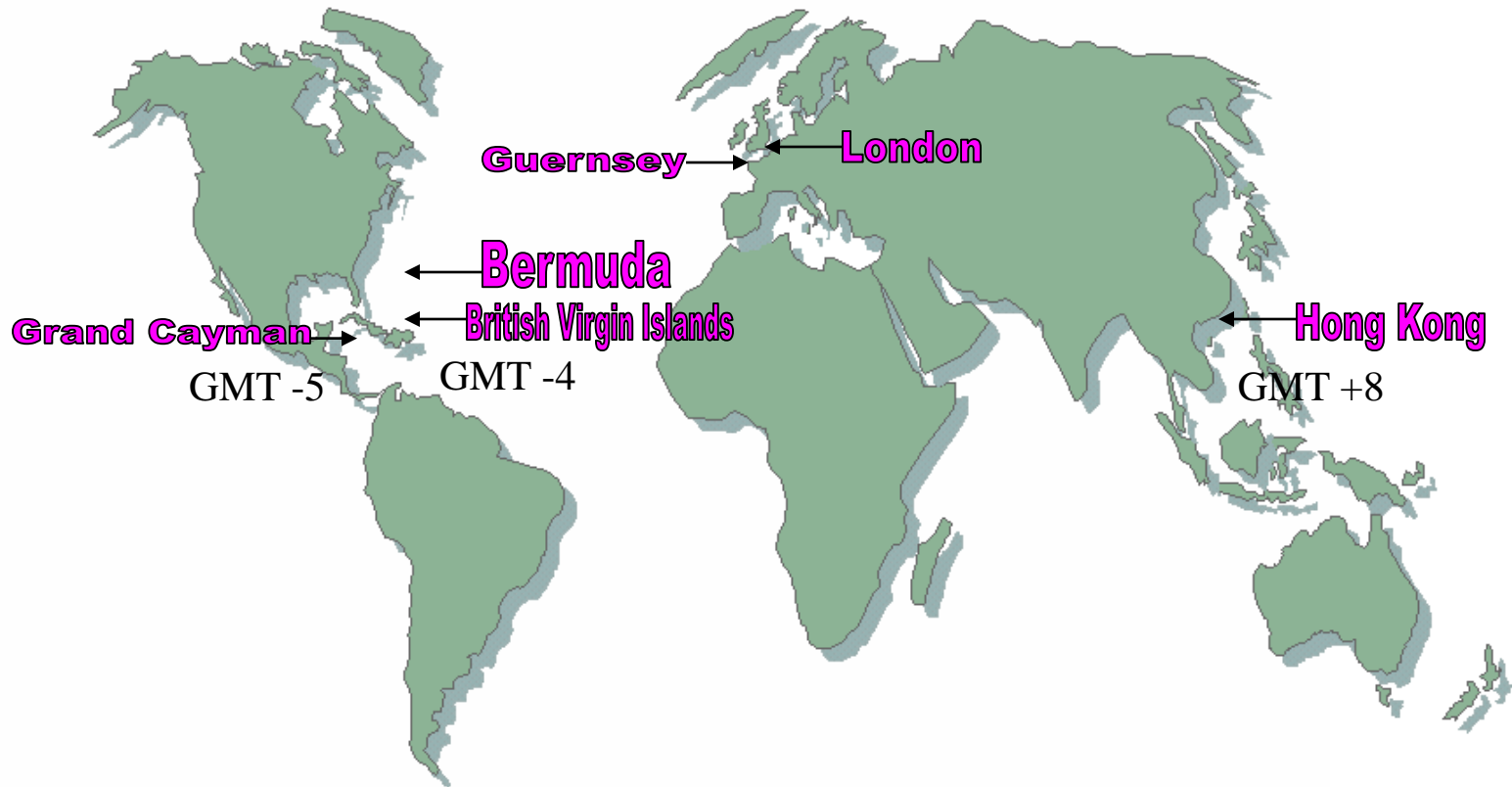


# The Challenge

- Provide document management and unified messaging and collaboration capabilities to all users worldwide
- Ensure availability and secure access to all the firm's document resources from any office
- Provide a smooth document migration path from SoftSolutions while maintaining acceptable quality of service



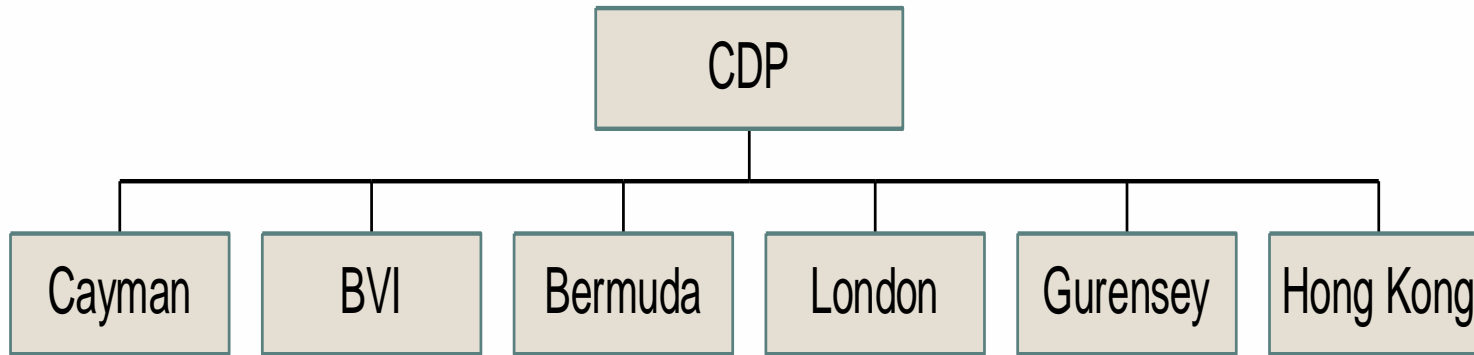
# Thirteen Time Zones



# Conditions Prior to Conversion

- SoftSolutions users since 1993
- Two SoftSolutions datasets in Bermuda
  - 250,000 Documents
- One dataset in each satellite office
- CCMail for email

# Novell Directory Services (NDS) Partition View



Take care when a Post Office is not in the same NDS Partition as its Domain.

TID 10013218—Error “GroupWise missing required attributes”

# Why GroupWise 5.5 DMS

- Strong system
  - Considered PCDocs, iManage, and WorldDocs
- Integration with GroupWise
- Ease of transition
  - Migration mechanics included with GroupWise
- Works with NetWare
  - No new operating system to learn/maintain
- Economics
  - Free



# Avanti Network Systems

- Atlanta based since 1987
- DMS experience since PerfectSolution 1.0 (1989)
  - First Authorized Training Center
- GroupWise experience since WordPerfect Office 3.0
- Services
  - Consulting; Installation & Configuration; Training





# Six Steps to Successful Project Outcome

- Step 1 —Project planning
- Step 2 —Implementation of plan
- Step 3 —Conversion from existing system
- Step 4 —Administrative training
- Step 5 —End-user training
- Step 6 —On-going service and support

# Step 1—Project Planning

- Conversion from CCMail and SoftSolutions
  - To be completed by November 1998
- Avanti Network Systems—contractor
  - Consulting
  - SoftSolutions conversion on site
  - Training



# Step 2—Implementation

## First Test Migration

- One GroupWise server
  - Domain, Post Office, Library, Agents
- SoftSolutions dataset and documents on existing file server
- Result: migrate 800-1200 documents per hour



# Step 2—Implementation

## Second Test Migration

- Dataset on local drive, documents on file server
  - Copy files to C:\dataset
    - » CONTROL.DAT
    - » APPLICAT.DAT
    - » CUSTOM.DAT
    - » PROFILES.DAT
    - » SECURITY.DAT
    - » USERS.DAT
    - » DOCTYPES.DAT
    - » VERSIONS.DAT
    - » COMMENT.DAT
    - » SECUSER.DAT
  - Migrate from workstation
  - Migration 2000-5000 documents per hour
    - TID # 2922581—SoftSolutions Migration to GroupWise 5.5

# Step 3—Conversion

## GroupWise Client

- CCMail
  - Standard migration gateway
- GroupWise version update
  - Push 5.5 client via NAL



# Step 3—Conversion

## SoftSolutions to GroupWise

- SoftSolutions migration
  - LONG weekend in October, 1998
  - Most recent first
    - 25,000 revised within 90 days
  - Batches of 25,000
    - Revised within 5000 days
- For more information on migration, see the Administration Manuals



# Step 4—Administrative Training

- Official Courses
  - 350 GroupWise Administration
  - 352 GroupWise Advanced Administration
  - 354 GroupWise Net Access and Connectivity
- Customized—Balance of Staff
  - Installation-specific
  - Supplied by Avanti Network Systems

# Step 5—End-User Training

- Provided by in-house trainer
  - “Lunch and Learn” sessions
- Customized training materials
  - Four hour course
    - GroupWise version differences
    - DMS differences
    - Supplied by Avanti



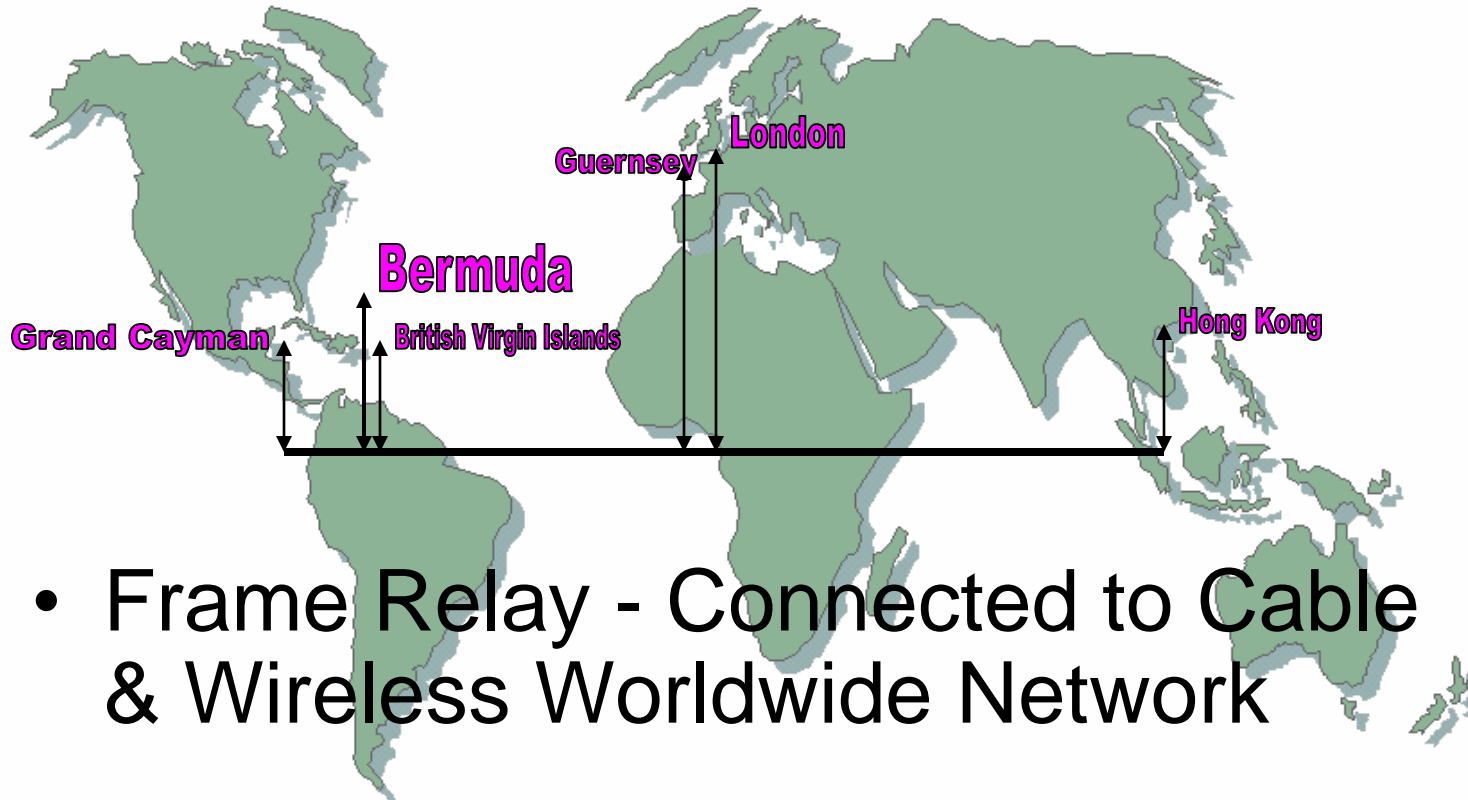


# Step 6—On-Going Service and Support

- Primary in-house support
- Occasional outside support



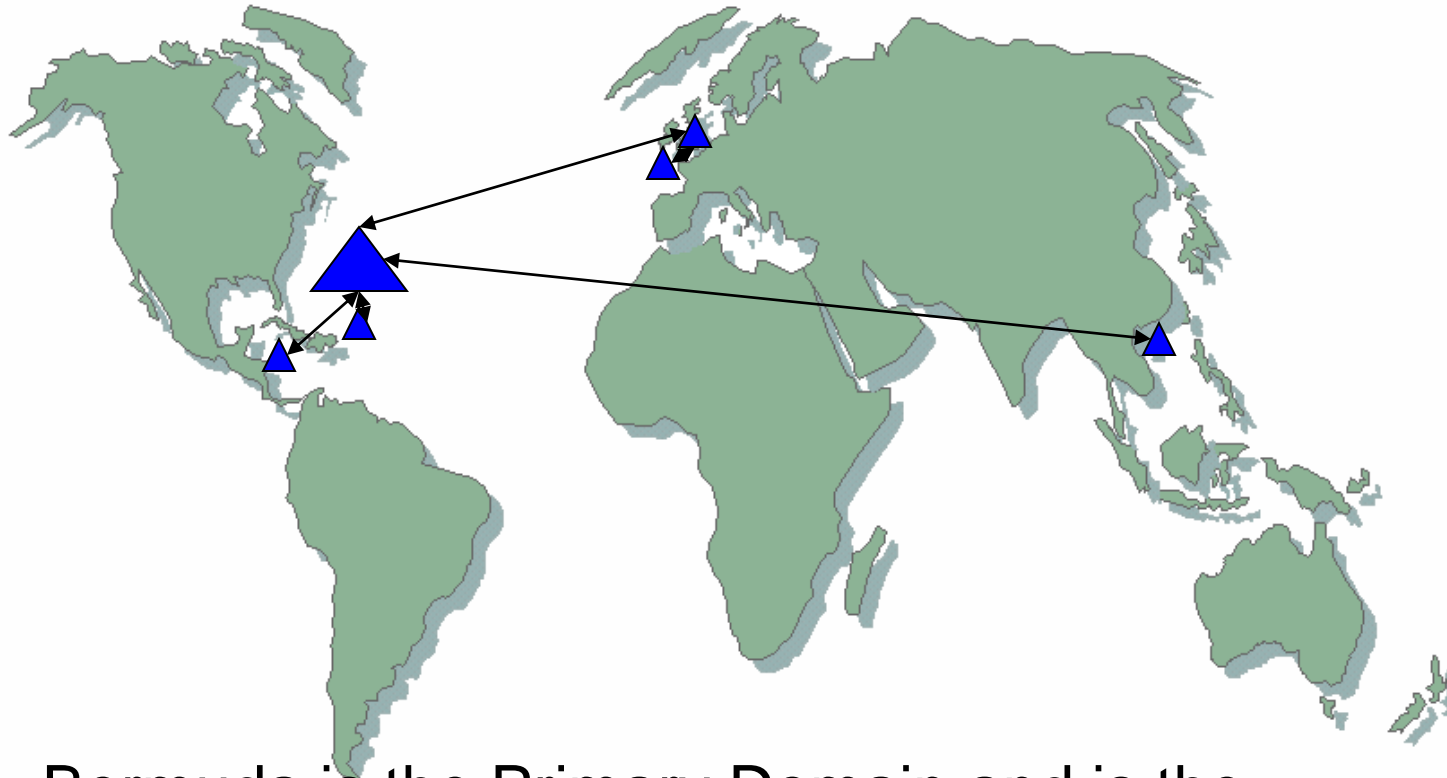
# Connectivity Infrastructure



- Frame Relay - Connected to Cable & Wireless Worldwide Network

- Bermuda Office CBR 64/128kb
- Satellite Office CBR 16/64kb

# GroupWise Components — Domain Links

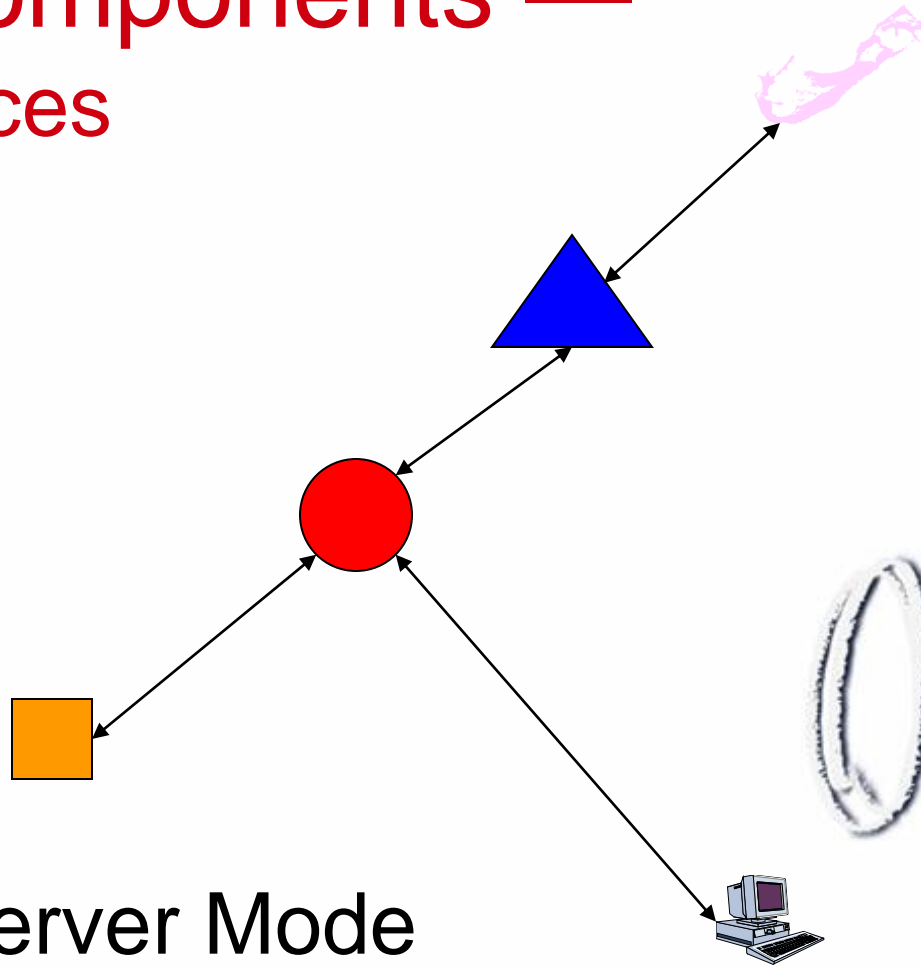


Bermuda is the Primary Domain and is the center of a “Hybrid Star”. Guernsey has a direct link to London. All links use TCP/IP protocol.



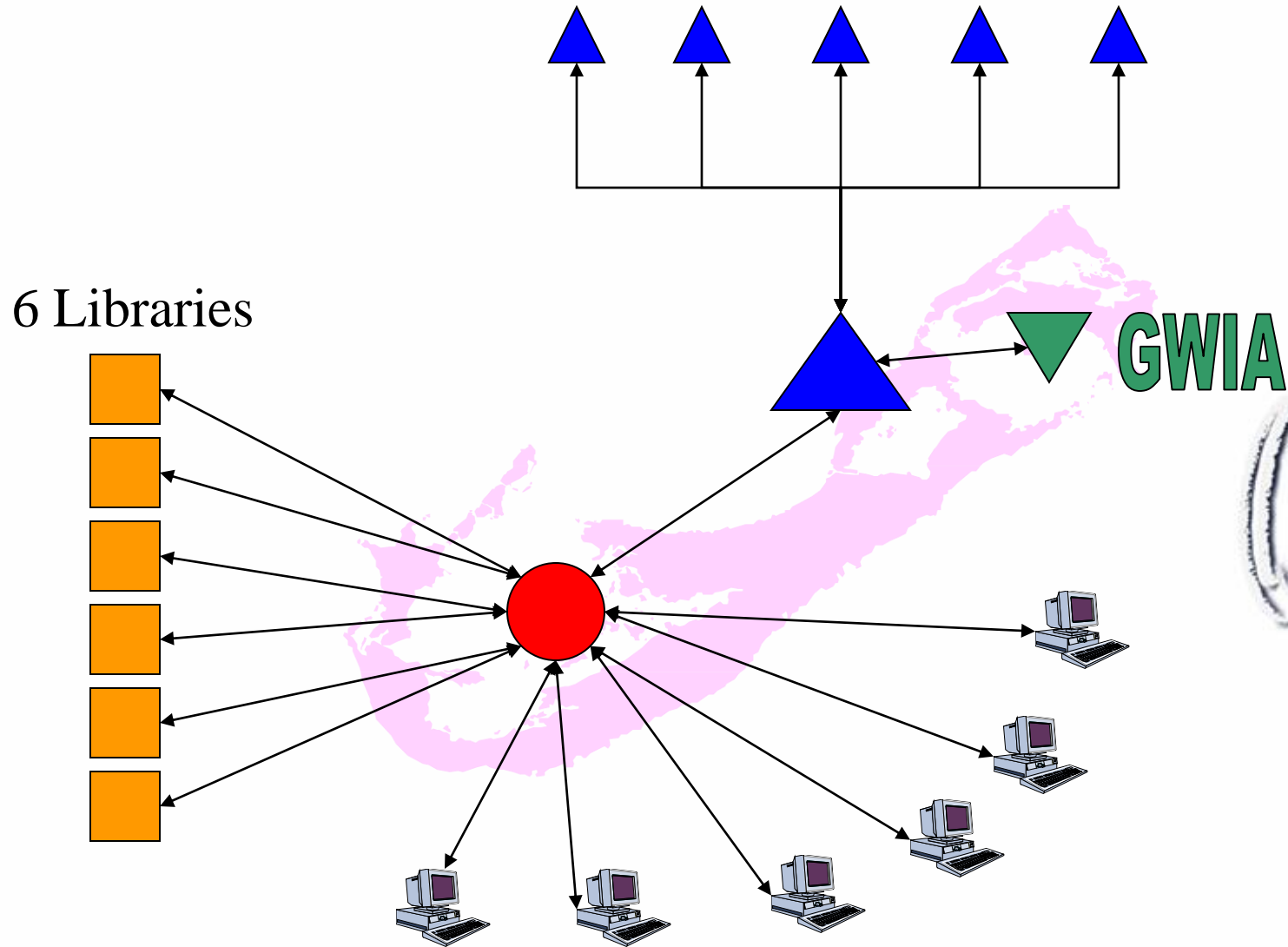
# GroupWise Components — Satellite Offices

- One Domain
- One Post Office
- One Library
- Users in Client/Server Mode



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# GroupWise Components— Bermuda

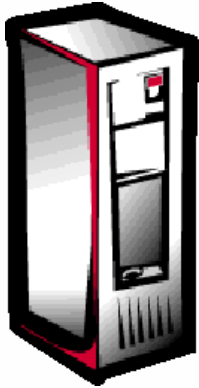


# Bermuda MTA Settings

- Agent settings
  - Standard
- NOS settings
  - » Follow Novell GroupWise Sizing Recommendations
    - TID 10016883—GW Sizing Recommendations
    - APPNotes—October 1999



# Bermuda—2 Servers, 1 Post Office



- GWSERVER

- Holds
  - Domain
  - Post Office
- POA performs
  - Client/Server
  - Messaging
  - Scheduled Events



- INDEXER

- Connects to GWSERVER
  - /USER
  - /PASSWORD
- QF (POA) Performs
  - QF Indexing

# Bermuda POA Settings

- Agent settings

- » /Name - POA
- » /NOQF
- » /MF - All
- » /MSThreads - 30
- » /TCPThreads - 50

- NOS settings

- TID 10016883—GW Sizing Recommendations
- APPNotes—October 1999





# Bermuda POA Settings

- Scheduled Events
  - Daily Analyze/Fix—Structure
  - Weekly Analyze/Fix—Content
  - Weekly Expire/Reduce
    - Sent items over 30 days

# Bermuda QF (POA) Settings

- Agent settings

- » /Name - QF
- » /User -
- » /Password -
- » /QFInterval - 1
- » /MF - OFF
- » /NOTCPIP

- NOS settings

- TID 10016883—GW Sizing Recommendations



# Bermuda QF (POA) Settings

- Weekly Analyze/Fix—Library
  - Options 1,2,3,4
- Weekly Archive/Delete

# Gateway Settings

- GWIA
  - Standard settings
- WebAccess
  - Standard settings

# Client Rollout (NAL)

- Application built in Bermuda
- Passed to each satellite office server
- Pushed as NALDesk object



# Other Novell Tools

- Z.E.N.Works
  - NAL
  - Remote
  - Workstation registration & policies
- BorderManager
  - Overseas offices proxy in Bermuda for Internet
- ManageWise

# The Results

- Person in any office can find document in any other office in less than five seconds
- Shared folders
  - Precedence folder for attorneys in all other offices
- IT department can login as GroupWise user in overseas office to troubleshoot



# The Next Steps

- Move documents to separate server
  - New Document Storage Areas
- Monitor GroupWise
  - Enhancement Pack
  - 3rd Party





# Useful TIDs

- 292581—SoftSolutions Migration to GroupWise 5.5
- 10016883—GW Sizing Recommendations
- 100123418 & 10009898—Error “GroupWise missing required Attributes”



# Speakers Info

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Q&A

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Optional stuff follows.



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An aerial photograph of a winding river with a boat on the water. The river flows from the top left towards the bottom right, curving several times. The banks are covered in dense green vegetation. A small boat is visible on the river in the lower right quadrant. The overall scene is a natural, scenic landscape.

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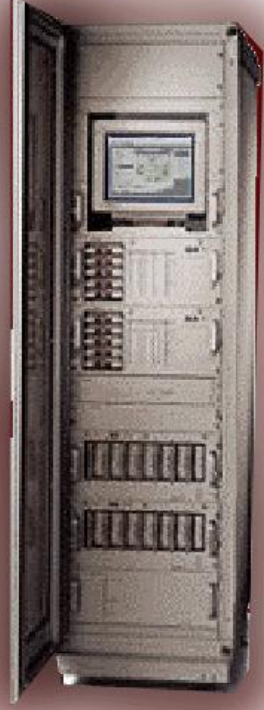
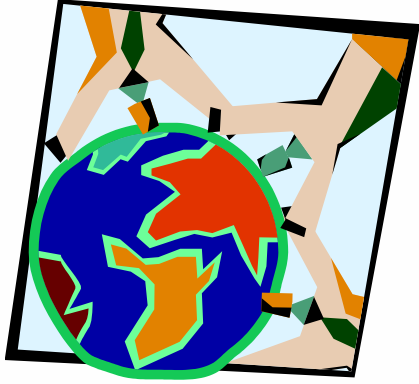
An aerial photograph of a winding river with a red boat on the water. The river flows from the top left towards the bottom right, with several sharp turns. The water is a deep blue-grey color, and the surrounding land is a mix of green and brown, suggesting a natural, possibly forested, environment. The boat is a small, bright red vessel, positioned in the middle of the river's curve. The overall scene is serene and scenic.

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Q & A

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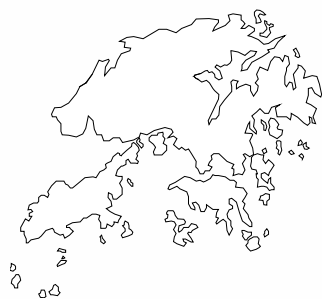
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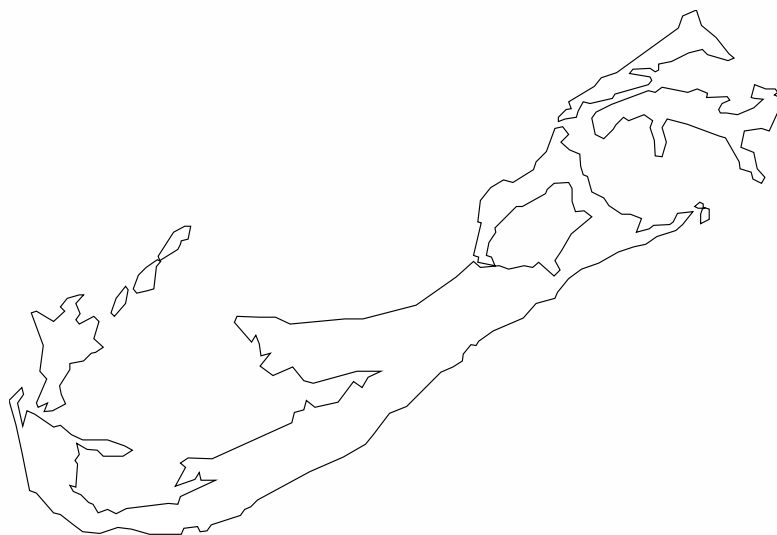
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