How do I migrate Lotus Notes applications to ServiceNow?

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Many Lotus Notes applications are task- and workflow-based, which makes them ideal candidates for migration to the Now Platform®.

What options do I have for migrating Lotus Notes applications?

Use the decision tree below to determine your migration option for individual Lotus Notes applications.

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Is this application business critical?</strong></td>
<td><strong>Are the application’s workflow, data model, and integrations simple or complex?</strong></td>
<td><strong>Does the application share workflows with other applications?</strong></td>
</tr>
<tr>
<td><strong>Does it have significant use?</strong></td>
<td><strong>Answered ‘Yes’ to either question or both</strong></td>
<td><strong>Complex</strong></td>
</tr>
<tr>
<td><strong>Answered ‘No’ to both questions</strong></td>
<td><strong>Simple</strong></td>
<td><strong>Yes</strong></td>
</tr>
</tbody>
</table>

Decommission the application.
Applications that don’t have a clear business need should be retired to avoid adding complexity to your Now Platform.

If the data associated with the application has archiving requirements, be sure to have a strategy for preserving the data before you decommission the application.

Consider rebuilding the application as a service catalog item.
Use the out-of-the-box service catalog to request a data model, or define your own data model within the service catalog. You can also allow business users to rebuild the app using delegated development and App Engine Studio.

If the application has a complex data model, workflow, security requirements, or integration, implement it as a standalone application on the Now Platform.

Consolidate applications for scale and faster migration.
You may have multiple Lotus Notes applications serving the same purpose but for different departments and functions. You can consolidate these into a single ServiceNow® application, create different scopes representing different functional groups, and/or build reusable components (e.g., an approval flow that can be used by multiple services and/or applications).
How do I map an application’s data model in ServiceNow?

The data model from your Lotus Notes application will include tables, fields, files, and data relationships. This should map into ServiceNow as a table, with appropriate fields and security. If your Lotus Notes application requires SLAs or Visual Task Boards, extend the Task table. The Task table provides standard fields used on each of the tables that extend it, such as the Incident and Problem tables. This can provide functionality for driving tasks (including approval rules, assignment rules, and task relationships), but also includes metadata you may not need.

What other data considerations do I need to take into account?

- **Normalize user data** – User data in a Lotus Notes application may not adhere to the same conventions (e.g., how names are listed/stored) you have in ServiceNow. Application owners need to manually review user data fields to identify where data conventions are different from ServiceNow, especially if data needs to be migrated to ServiceNow.

- **Consider attachments for each record** – If there are attachments to the app, download them from Lotus Notes. Then upload and attach them to each record in ServiceNow.

- **Account for security when decommissioning applications or setting up access in ServiceNow**

- **When decommissioning applications, archive data considering the compliance and regulatory requirements** – For example, retaining data for seven years according to US Government regulations.

<table>
<thead>
<tr>
<th>Business need</th>
<th>Data requirements</th>
<th>Business logic and presentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What’s the functional application description?</td>
<td>1. How many Notes database(s) are used by this application?</td>
<td>1. Are there integrations or messaging involved with this application?</td>
</tr>
<tr>
<td>2. Who’s the business owner?</td>
<td>2. What is the current size of the database(s)?</td>
<td>2. What kind of rule-based roles are required? What are the security requirements?</td>
</tr>
<tr>
<td>3. What’s the business criticality of the application (on a scale of 1–10)?</td>
<td>3. How many documents are in the database?</td>
<td>3. Does it need to be optimized for mobile?</td>
</tr>
<tr>
<td>4. How much use has the application had in the last 90 days?</td>
<td>4. Do we need to migrate existing/historical data?</td>
<td>4. Does it generate Outlook calendar invites?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Do you want to migrate as is or update functionality based on business needs?</td>
</tr>
</tbody>
</table>

How do I migrate Lotus Notes applications to ServiceNow? (Cont.)

What data do I need to inform my migration decision? Look at migration as an opportunity to improve and simplify applications. Work with application and process owners to answer these questions before you make your migration decision.

1. What's the functional application description?
2. Who's the business owner?
3. What's the business criticality of the application (on a scale of 1–10)?
4. How much use has the application had in the last 90 days?
5. How many Notes database(s) are used by this application?
6. What is the current size of the database(s)?
7. How many documents are in the database?
8. Do we need to migrate existing/historical data?
9. Are there integrations or messaging involved with this application?
10. What kind of rule-based roles are required? What are the security requirements?
11. Does it need to be optimized for mobile?
12. Does it generate Outlook calendar invites?
13. Do you want to migrate as is or update functionality based on business needs?
# How do I migrate Lotus Notes applications to ServiceNow? (Cont.)

## What steps should I take to rebuild an application in ServiceNow?

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. BUILD THE DATA MODEL</td>
<td>- Create a table structure that autogenerates APIs, list views, and forms.</td>
</tr>
</tbody>
</table>
| 2. ADJUST LIST AND FORM VIEWS | - Adjust autogenerated forms.  
- Insert sample data to create reports and dashboards.  
- Use ServiceNow’s out-of-the-box Service Portal to view single-page applications (as needed). |
| 3. BUILD THE BUSINESS LOGIC | - Ensure you have a clear understanding of the workflow supported by the application, including approvals and data transformation.  
- Build the ServiceNow application using business rules and ServiceNow Flow Designer.  
- Identify where integrations are needed. |
| 4. TEST AND PUBLISH | - Run small functional tests as you implement each feature.  
- Run full tests with production-ready data, using Automated Test Framework.  
- Use Git as your repo for version control and source code management.  
- Consider initially releasing to a smaller group to collect feedback. |

## How do I accelerate and scale migration?

- **Build shared modules for common workflows** – Many applications may use the same workflow (like an approval workflow). Look across the portfolio of applications you want to migrate, identify common workflows across these applications, and build a single module in ServiceNow that migrated applications can call/ invoke.

- **Identify where you can use delegated development** – For simple applications, use delegated development to enlist business unit developers (or even citizen developers) to rebuild applications on ServiceNow. Make sure to accompany this with appropriate coaching and training as needed.

- **Break your migration into clear, focused phases** – Define migration phases (no longer than two or three months), so that you can cluster and prioritize migration efforts by line of business or criticality. This also allows you to show progress to key stakeholders and request additional resources where needed.

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If you have any questions on this topic or you would like to be a contributor to future ServiceNow best practice content, please contact us.

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Related resources: