

III. The Big Checklist

Chapter 5

The Network Migration Checklist Explained

At long last, we get to The Checklist!

Well, actually, we get to it in the appendices. There we simply present The Checklist. This chapter describes and explains each element of The Checklist.

Chapter Six will talk about strategies in using The Checklist. In the meantime, here's the description of the tool you'll use to execute your excellent Network Migration Project.

We refer here and elsewhere to “The” Checklist. In fact, we have provided two sample checklists in appendices A and B. You will certainly customize your own checklist the first time you use it.

The Checklist As A Living Document

We literally consider The Checklist to be a **living document**. At several points in The Checklist you will find directives to update the documentation, including The Checklist itself.

We were long delayed in releasing this book because The Checklist kept changing. Once SBS 2008 was released, Microsoft released a series of white papers, blog posts, Knowledge Base articles, and other materials.

Then there were updates for various versions of Windows. And updates from third party vendors. And so forth and so on.

At some point we decided to just stop trying to update The Checklist. 99.9% of it remained the same anyway. Most of the documents from Microsoft were clarifying documents.

You should also be very clear about how we built this checklist: It is based on how KPEnterprises migrates networks. We have not made an attempt to include every configuration scenario or every third party vendor.

At the same time, the modular nature of The Checklist means that you can plug in a checklist for configuring your favorite firewall or your favorite anti-virus.

Before we go section by section through The Checklist, we want to cover some of the best practices and core philosophies that we believe make The Checklist useful and valuable. After that we give an overview of how The Checklist is used by the technicians who actually implement migration projects.

But first, let's look at the primary sections of The Checklist. We gave an initial overview in Chapter Three. Now let's go one level deeper.

The Checklist has twenty-six sections, some of which are very long, and some of which are a single page. It is organized this way so that technicians can treat each section as a stage in the overall migration process. Some stages (such as moving profiles) are just more complicated than others (such as meeting with the client at the end).

Here are the sections for The Checklist:

1. Using This Document
2. Pre-Discovery
3. Project Description and Scope
4. Discovery
5. Planning / Timeline
6. Migration Strategies
7. Resources
8. Communications / Training
9. Old Network Documentation
10. System Build
11. Troubleshooting and Repair Log
12. Network Migration Preparation
13. Network Migration
14. Applications Migration
15. Sub-Systems Migration
16. Workstation Migration
17. Remote Migration
18. Migration Tracking Sheet
19. Shortages
20. Pack-Up / To-Do Checklist
21. Fine Tuning
22. Spin-Off Projects and Issues
23. Project Completion
24. Retrospective and Revision History

25. Project Notes

26. New Network Documentation

Each of these sections represents one or more nested checklists.

What The Checklist Is and Isn't

We want to be very clear that this checklist is exactly as we use it within our company to achieve Zero Downtime Migrations. That means it relies on some assumptions about how we operate.

It also means:

- The Checklist is very detailed in some places and very sparse in others.
- Some parts of The Checklist are vendor specific. We left them that way in order to be as complete as possible. We explain how to switch out these sections for your own.
- The Checklist is very modular. If you don't need a section for a specific migration, cross it out. If you have a client with a different firewall, trade out one section for another.
- The 2003 Checklist is essentially "frozen in time" compared to the 2008 Checklist. When we revised processes for 2008, we did not go back and make all the changes to the 2003 Checklist.
- The Checklist does not contain a section for everything you can think of. It couldn't, of course. But it's modular construction allows for easy updates and changes.
- We believe the Pre-Discovery and Discovery processes are quite thorough, but they don't cover everything out there.

NOTE: Your project success and fine tuning will both be directly proportional to the attention given to the Pre-Discovery and Discovery. If you already know and manage a client's network, the Discovery phases should be easy.

- The Checklist is designed to contain enough information for a trained technician to complete the tasks. Additional information on how to run a project is not included as it would only clutter up a large document.

So, The Checklist is not perfect. Nor is it necessarily complete unless you do migrations exactly as we do.

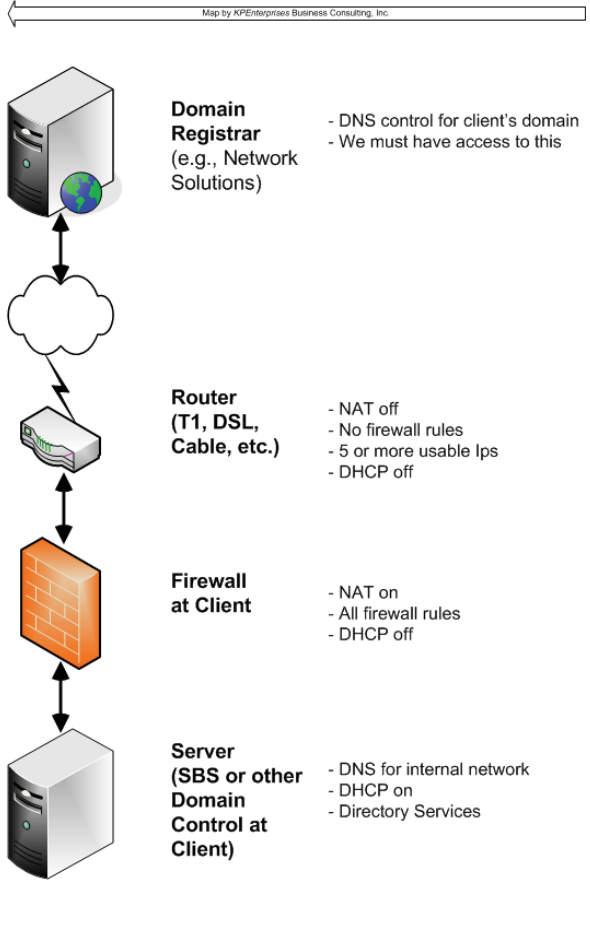
Best Practices And Core Philosophies

Just like you or any other consultant, we have developed some “best practices” that bring consistency, reproducibility, and profit to our migration projects.

While we’ve scattered our best practices throughout the book, here are a few more key elements to making migrations successful. Please see the illustration entitled *Functional Map: KPE Migration Preferences*, below.

- We feel very strongly that we must control the client’s Internet Domain registration, and DNS in particular. This gives us the ability to apply fully qualified domain names (FQDN) to machines on the network, including the SBS box, the Integrated Lights Out (ILO) card, and other machines and devices on the network. We don’t want to be at the mercy of an ISP or other vendor.
- We maintain DNS at the domain registrar (Network Solutions or some other) because we don’t want to maintain a DNS server, and we need absolute uptime for DNS.
- We insist that clients have Internet service with at least five usable IP addresses. That gives us the ability to connect remotely to the firewall, the server, the ILO, a web-enabled AC power switch, and a second server. We can reconfigure as needed, but we need a lot more functionality than you can get from a single IP.

Functional Map | KPE Migration Preferences



- We make sure the ISP has turned off Network Address Translation (NAT), firewall rules, and DHCP on their router. This allows them to push all the Internet traffic directly to our firewall. Again, this gives us complete control and we never have to wait for the ISP to make a change.
- We have a standard set of configurations we use on the firewall. We also have a preferred brand, which makes management easier.
- We turn off DHCP on the firewall and turn it on at the server. This is true whether the network is SBS or plain Server 2008.
- We set up printers directly on the network and not in active directory. Today’s laser printers have lots of memory and running print jobs through the server just doesn’t