

# FIVE GOLDEN RULES FOR A SUCCESSFUL UBUNTU DESKTOP MIGRATION

An Ubuntu workbook  
from Canonical



CANONICAL™

## INTRODUCTION

**So, you like the idea of deploying an Ubuntu desktop to all or some of your users. You like the way Ubuntu's light-client model can give your older desktop machines a new lease of life. You like the fact that Ubuntu is secure, portable, and easy to manage. Best of all, you like that it costs nothing to license, and comes with a host of enterprise-grade apps that cost nothing to license either.**

Now it's time to see how it works for you in the real world.

To help you plan your migration, we've compiled our five golden rules for success. These are things we've learned from the hundreds of Ubuntu desktop migrations we've conducted for clients around the world – from the French National Police Force to the Supreme Court of India.

You can use this book as a workbook as you plan your project. If at any time you need advice from the people who know Ubuntu best, please feel free to get in touch with us. We're here to help your migration go as smoothly and as successfully as possible.

The Canonical Desktop team



## FIVE GOLDEN RULES FOR A SUCCESSFUL UBUNTU MIGRATION

While every organisation and every Ubuntu deployment is different, there are some universal rules that apply in every case. Stick to the five rules below and your migration will be on track for success. Fail to follow any of them and you may end up dealing with problems that are completely avoidable.



**PLAN:** DOCUMENT THE FULL SCOPE OF THE PROJECT BEFORE YOU START

1

**USERS:** TARGET THE MOST SUITABLE USERS FOR MIGRATION

2

**APPS:** IDENTIFY THE BEST EQUIVALENT APPS AND DEPLOYMENT MODELS

3

**MANAGEMENT FLOW:** GET THE RIGHT MANAGEMENT INFRASTRUCTURE IN PLACE

4

**PILOT:** START WITH A SMALL PILOT, THEN EXPAND IT AS ISSUES ARE IRONED OUT

5

## RULE ONE MAKE A THOROUGH PLAN

It should go without saying that any project needs a comprehensive plan, but in our experience, migration plans often come up short. Before you start, draft a plan that covers the why, the what and the how of what you want to achieve, including:

### Business Case

The rationale for the move to Ubuntu, and the benefits it will bring to individual users and to the organisation as a whole. *Remember to factor in all license cost savings as well as savings from extending the life of older hardware (Ubuntu flies where Windows crawls).*

### Pre-Support Environment

How well is your support environment set up to manage the new Ubuntu users? Do you have the right capabilities across the planned hardware, OS, apps and networking? *You may find you already have the right skills in place, but documenting any gaps will help you decide whether to boost your internal support function.*

### Post-Support Environment

The required support environment post-implementation and how you will achieve it (if it's different from what you have today) – e.g. by training existing staff or hiring in Linux support skills. *Addressing support needs now will reduce risk and give a fuller picture of the financial impact of the migration.*

### Issues Handling

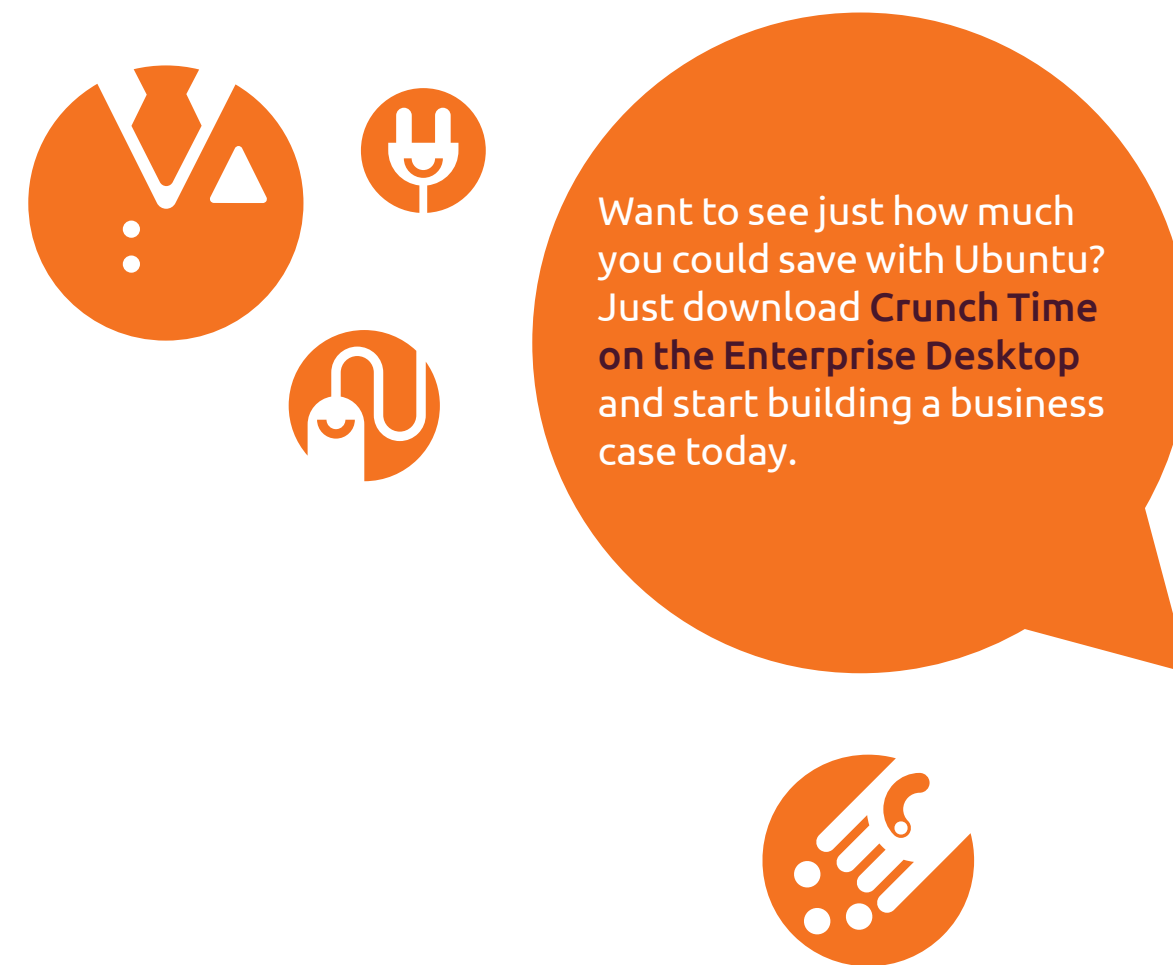
How are technical issues currently handled – do you have an in-house software engineering team or is this something you escalate externally? Will you adopt the same approach for the Ubuntu implementation or will you handle it differently? *Understanding your capabilities and limitations will ensure the right skills are available from the start.*

### Timescale

The proposed timeline for the project, with clearly defined project stages, objectives and KPIs. *This will help you to keep the project on track, measure its success and update everyone on its progress.*

### Roles and Responsibilities

Names and responsibilities of those involved in the project, including third-parties, with contact details. *Establishing who is responsible for what is critical to making sure everything is delivered as planned, and to avoid any confusion or finger-pointing along the way.*



Want to see just how much you could save with Ubuntu? Just download **Crunch Time on the Enterprise Desktop** and start building a business case today.

## RULE TWO TARGET THE RIGHT USERS

Before you start, do some thorough research into the types of users most suitable for Ubuntu.

You'll probably find that some aren't right for Ubuntu at the moment – particularly users who rely on high-end, thick-client apps for which no suitable open-source equivalent currently exists. Don't let that put you off – no single operating system ever suited everyone. Instead, try to identify clearly-defined groups of users who can benefit from Ubuntu now, rather than aiming to migrate as many desktops as possible.

Typically, these will be users for whom there's an equivalent open-source app for all or most of the apps they use every day. Before you start, spend some time with them noting what functionality they actually use, and what they could do without – that will help you identify the best equivalent apps and desktop builds.

Training requirements will be an important consideration too – some users will need very little help with the intuitive Ubuntu environment, while others will need some guidance.



We've found Ubuntu to be ideally suited to these types of user:



**NEW GRADUATE JOINERS**  
the 'Facebook generation' have grown up with the browser and readily adapt to new apps and interfaces



**MOBILE WORKERS WHO NEED TO STAY PRODUCTIVE**  
with Ubuntu, 3G and WiFi connectivity are simple to set up and easy to manage



**EMPLOYEES USING MAINLY SAAS OR BROWSER-BASED APPS**  
why pay for an OS license when all they use is a browser?



**CLERICAL STAFF USING MAINLY WORD PROCESSING, SPREADSHEETS, PRESENTATION SOFTWARE AND EMAIL**  
Ubuntu comes with LibreOffice which has all the functionality of Microsoft Office – without the price tag

## RULE THREE

# FIND EQUIVALENT APPS

**For most users, apps are the essential tools that let them do their job effectively. Getting the apps right on the Ubuntu desktop is critical for achieving user acceptance.**

There may be a Linux version of the proprietary apps your organisation uses today, but if one of the aims of your migration project is to save money, you'll also want to look at alternatives that are going to cost you less - or ideally nothing - to license.

To make sure the target users you've selected are enthusiastic about Ubuntu from the start, you'll need to give them apps that are largely the same as (or better than) the proprietary desktop apps they use today. With more vendors offering SaaS-based versions of existing applications, the transition may be as simple as moving from a desktop version to a browser-based version.

But for everything else, you're going to have to make three basic decisions: find an open-source equivalent, find a SaaS-based equivalent, or – as a last resort – consider virtualising the existing app.

### 1) Identify equivalent open-source apps.

There are many open-source apps that offer similar (if not identical) functionality to proprietary applications. We've listed eight commonly-used equivalents in the table to the right – and you can find many more at [www.osalt.com](http://www.osalt.com). (When you've mapped your equivalents, take a moment to realise how much you'll save in licensing costs!)

**Pro Tip:** If you choose to virtualise an existing app, review the business case for it regularly. You may find it's no longer being used, or that an open-source or SaaS alternative is now available.

PROPRIETARY APPLICATION	OPEN-SOURCE EQUIVALENT
Microsoft Word	LibreOffice Writer
Microsoft PowerPoint	LibreOffice Impress
Microsoft Excel	LibreOffice Calc
Microsoft Outlook	Evolution
Microsoft Access	LibreOffice Base
Adobe Acrobat Reader	Evince
Adobe Illustrator	Xara LX
Adobe InDesign	Scribus

## RULE THREE (Continued)

### FIND EQUIVALENT APPS

#### 2) Look for a SaaS-based alternative.

If no direct open-source equivalent exists, the next best approach is to identify a Cloud or SaaS alternative that requires no client software to be installed.

Ubuntu + browser = a fast, easy way to run any SaaS application (and everyone knows how to use a browser).

#### 3) As a last resort, virtualise.

If the first two avenues have been exhausted and no suitable equivalent found, consider delivering the existing proprietary app in a virtualised environment.

This is the most expensive and time-consuming solution of the three, so should only be used if there really is no alternative – and only for those users who really need it.

**Pro Tip:** To ensure a smooth transition for your users, consider introducing Ubuntu as a dual-boot option with their existing OS initially, so they can switch back to the more familiar environment if they get stuck. Alternatively, you can deploy the equivalent open-source apps on Windows to begin with, so users can get used to their look and feel.

# RULE THREE (Continued) FINDING EQUIVALENT APPS – DECISION TREE



DOES THIS USER RELY  
ON ANY PROPRIETARY  
CLIENT-SIDE APPS?

**YES**

**NO**

(THIS IS A NEW USER OR  
SOMEONE WHO USES  
CLOUD-BASED APPS ONLY)  
**NO ACTION.**

IS THERE A SUITABLE  
OPEN-SOURCE  
ALTERNATIVE?

**YES**

**NO**

IS THERE A  
SUITABLE SAAS  
OR CLOUD-BASED  
ALTERNATIVE?

INCLUDE ALTERNATIVE  
IN DESKTOP BUILD

**YES**

**NO**

VIRTUALISE THE ORIGINAL  
APP FOR THOSE WHO NEED  
IT - UNTIL YOU CAN FIND A  
BETTER ALTERNATIVE.

CREATE ACCOUNT  
FOR USER

**Pro Tip:** Remember that with Ubuntu you can easily create custom builds for different types of user. If you need to virtualise an app, only deliver it to users who need it – delivering it to everyone will cost more and make your migration more complex.

## RULE FOUR

# GET THE RIGHT MANAGEMENT TOOLS IN PLACE

A common objection to deploying Ubuntu (or any alternative operating system) on the enterprise desktop is that it adds an extra layer of systems management.

But while it's true that nothing manages Ubuntu better than management tools designed for Ubuntu, it doesn't mean your admin workload will be doubled. In fact, Ubuntu's slimline, targeted builds will make your desktops more like thin-clients than the bloated desktops you're used to managing.

You may also find you can conduct many common tasks using your existing tools – for example, you can integrate your Ubuntu desktops with Microsoft Active Directory for authentication and identity management, using the free open-source tool BeyondTrust.

**Pro Tip:** Establish which tasks can be handled with your existing management tools and which can't. For the latter, install the Landscape management console from Canonical, and train one or two of your sys admins to use it – it will pay off by helping you to spot, analyse and fix problems faster.

## RULE FIVE

# START WITH A SMALL PILOT

The final stage in your preparation is to conduct a pilot, and the golden rule with pilot deployments is to start small. Even if you want the pilot to encompass a larger group, start off with just a handful of desktops. That way, any of the initial issues you come across – there are always issues, in any new deployment – can be ironed out with just a small user group. Once the big issues are out of the way, you can start to roll the pilot out to more users.

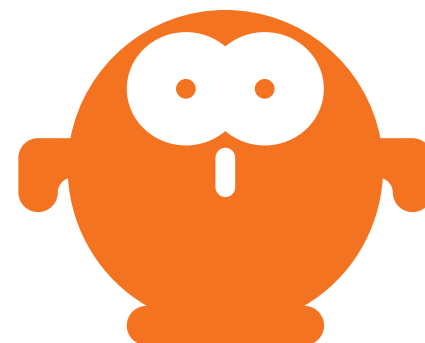
By this point you should be in a great position to move on to a larger pilot deployment, and then to the migration proper. However, if at any point in the process you feel the project is losing its way, or you run into problems you didn't expect, we've got one bonus golden rule to tell you about:

### GET EXPERT ADVICE

Canonical is the company behind Ubuntu and we're here to provide advice at any stage in your migration project – from initial planning to the final migration. If there's any aspect of your deployment that's bothering you, you can talk to us.

If you decide to engage us to plan and conduct your pilot, provide technical support for more than 10 desktops or manage your eventual migration project, there will be a cost (a fraction of what you're already spending on Windows). You can find out more about the enterprise services we provide at <http://www.ubuntu.com/business/services/overview>

We're also offering up our experts to help you through the initial migration steps. Apply for your free assessment here: <http://www.ubuntu.com/business/services/free-assessment>



## ABOUT CANONICAL

Canonical provides engineering, online and professional services to Ubuntu partners and customers worldwide. As the company behind the Ubuntu project, Canonical is committed to the production and support of Ubuntu – an ever-popular and fast-growing open-source operating system. It aims to ensure that Ubuntu is available to every organisation and individual on servers, desktops, laptops and netbooks.

Canonical partners with computer hardware manufacturers to certify Ubuntu, provides migration, deployment, support and training services to businesses, and offers online services direct to end users.

Canonical also builds and maintains collaborative, open-source development tools to ensure that organisations and individuals can participate fully in innovations within the open-source community.

For more information, please visit [www.canonical.com](http://www.canonical.com) or [www.ubuntu.com/business](http://www.ubuntu.com/business)



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