



# Desktop Migrations Methodology

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# Benefits of Ubuntu

- Technological
  - Reduce dependencies
  - Built for purpose
- Financial
  - Reduce capital expenditure
  - Reduce operational expenditure



# Ubuntu Advantage

brings Ubuntu to the  
Enterprise

Systems  
Management

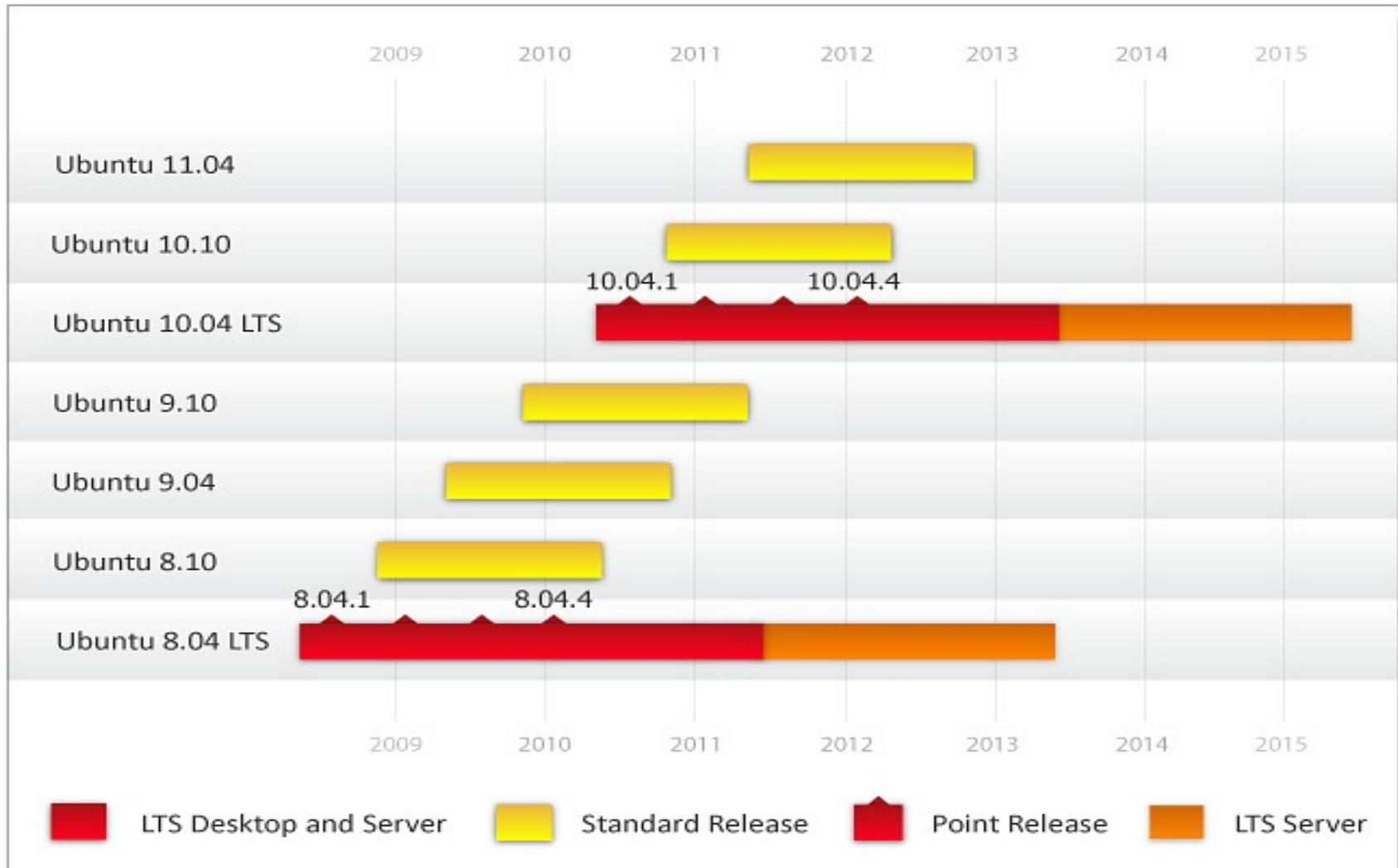
Platform and  
Application  
support

Knowledge  
Base

Legal  
Assurance



# Release Cycle





# Ubuntu Desktop Edition

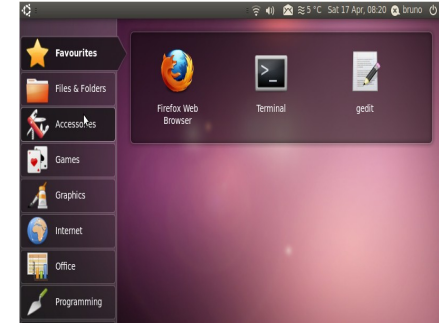


Ubuntu is leading the Linux Desktop:

- Great hardware support
- Distribution includes first-rate applications and utilities
- Solid commercial backing, including time based release cycle and long-term support from Canonical
- The most user friendly and ready to use
- Large and supportive user community



# Approach to Desktop Migration



## I. Assessment

- The most important part of successful Open clients migrations

## II. Controlled Deployment and Pilot

- Image building, controlled deployment and feedback

## III. Synthesis and planning for production deployment

- Implement changes reported during feedback period
- Plans for progressive Production deployment



# Assessment Phase

## Understanding Your Desktop Environment

- Target user type and scale
  - Which users in your organizations?
  - Roles, Skill sets, training
- Assess client application
  - Map data dependencies, identify application equivalency
  - (<http://osalt.com>)
- Network infrastructure and security
  - Authentication, security, network services, compliance
- Assess your desktop environment
  - System properties, custom profiles, special devices
  - Application usage patterns
- Assess your desktop hardware
  - Standardization, driver support, peripheral integration



# Controlled Deployment

- OS image building
  - Reduce footprint by removing non needed software
    - Less updates
    - Less management cost
    - Small agile OS base
- Deployment method
  - PXE/Network boot, USB flash drives, non interactive ISO install
  - Rescue / recovery methods
- Small initial test deployment on standard hardware
  - Collect and fix immediate issues
  - Back end integration testing (AD, LDAP, network storage ... )



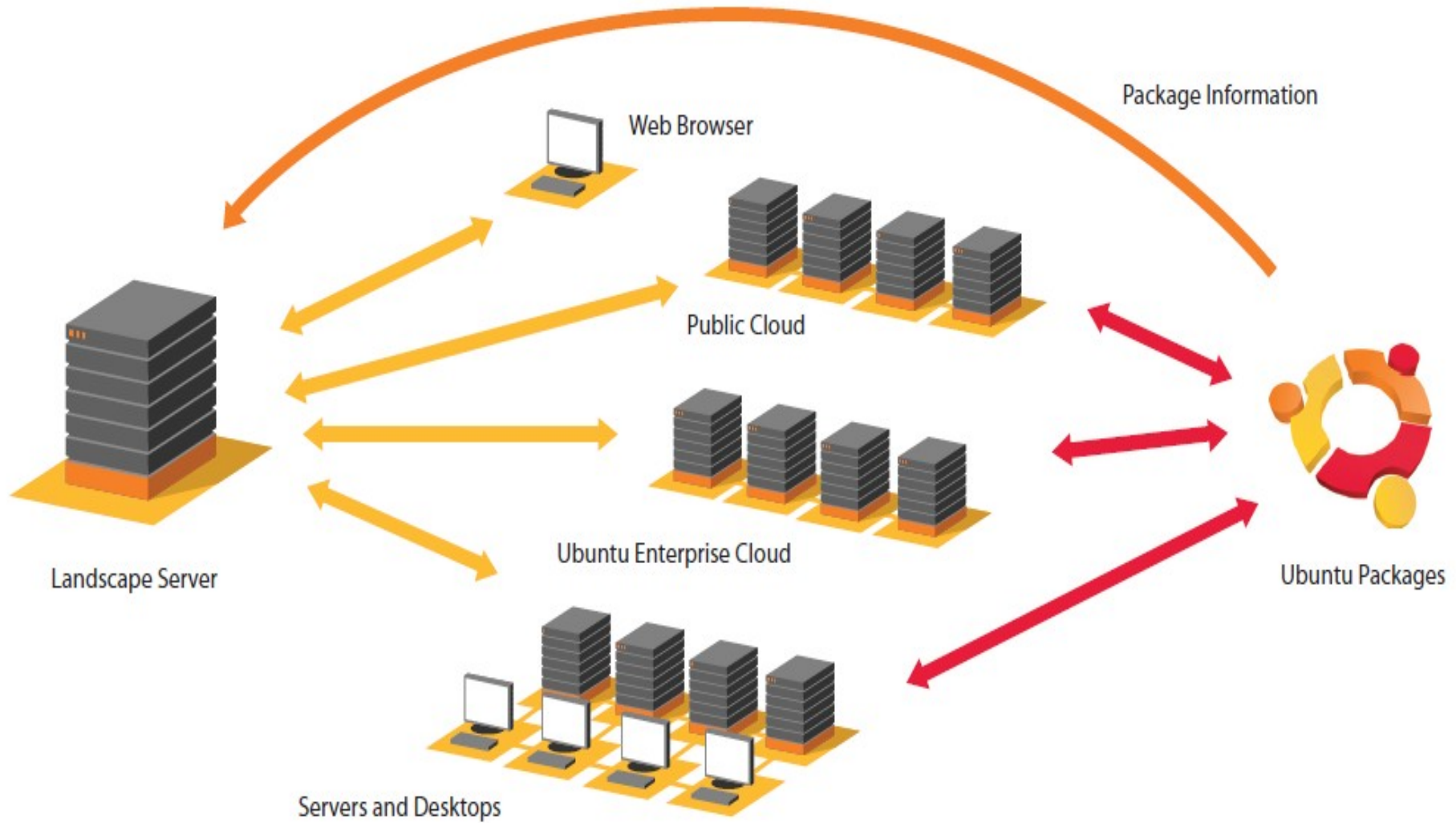


## Synthesis and Roll Out Plans

- Refine strategy and goals from Assessment phase findings
  - Reduce or enlarge the target users for migration
  - Standardize hardware to smooth user experience
  - Decide on applications and equivalence
- Build final image
  - Plan roll out:
    - Decide on deployment methods
    - Schedule deployment per departments across target users



# Landscape: Centralized Web System Management





## Conclusions

- Integrating or migrating to an Open Source client in an existing productivity infrastructure requires modifications to the official Ubuntu build
  - Valid and complete assessment is the foundation of migrations
  - Third party assets / policies / authentication management applications requires the most work
- Customization of the client image allows a smaller image, removing not needed software, meaning substantial savings in:
  - Licensing and application maintenance
  - Updates / Patch management
  - Authentication / certificates integration
  - Deployments costs
  - Disaster recoveries / imaging solutions
- Internal customers and management buy-in essential for success



## Canonical can help!

- Assessment phase: **Desktop migration assessment engagement**
  - Typically 2 days:
    - One day onsite gathering requirements
    - One day off site report writing
  - Deliverables:
    - Migration Assessment Document
      - Provide a view of requirements and objectives
      - Evaluates suitability for migration and suggestions
- Controlled deployment phase: **Custom build engagements**
  - Typically longer engagement (5 days+)
  - Image building and delivery, controlled roll-out, further customizations
  - Knowledge transfer, enablement and best practices



# Migrations with Canonical Services

- Investment Bank
  - 20 000 / 50 000 desktops
  - Existing Active Directory and network shares integration
  - Customization, packaging of third party software, integrations with asset management and auditing
  - From assessment to deployment, 7 months
  - Landscape Dedicated Server as management solution
  - Initial roll-out : 1000 desktops



# Migrations with Canonical Services

- Gendarmerie, French national police
  - Engaged Canonical with a PSE (Premium Service Engineer) service
  - 80 000 desktops over 5 years
  - Integration to existing AD infrastructure and bespoke management applications
  - Stakeholders became community involved
  - In third year of roll out, currently 40 000 desktop deployed
  - Case study soon available on our website
  - Significant license cost savings



# Migrations with Canonical Services

- Insurance company
  - Using Linux internally
  - 10 000+ Desktop clients (majority of laptops)
  - No AD integration, but high dependency on 3g network for remote workers and bespoke java applications
  - Build customization targeting 10.04 LTS, image development since 9.04
  - Engaged Canonical with PSE contract during image elaboration
  - Roll out in August / September 2010



Questions?

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