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The Best Tips from the Great Linux Desktop Migration Contest

by [Ed Stephenson](#)

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What's the best way to move an organization to a Linux desktop? That was the focus of the recent contest we held in conjunction with Novell, and participants offered lots of solid suggestions that we've presented below. There were prizes at stake, including a gift certificate for books from O'Reilly valued at \$1,500. Yet, for many, the chance to share an open source experience and persuade some corporate fence sitters to wean themselves from Windows was incentive enough.

The Great Linux Desktop Migration Contest asked for entries in three categories: write an essay on the Benefits of Migrating to Linux; present an example of a Phased Migration Plan; and give us three Tips for Migrating.

"Without a doubt, users absolutely hate change," says David D. Scribner of Arlington, Texas, our winner in the Tips category. "But by showing factual examples of how their software budgets are steadily increased due to forced upgrades and ever-increasing licensing costs, and how their data is literally 'locked in' to that vendor due to proprietary formats, their eyes start to slowly open when they become aware of the 'open alternative'."

A tech industry professional who's been "living and breathing PCs" since 1984, David made his own switch to Linux in 1999. Now, as an independent consultant, he helps clients migrate to the OS at both the desktop and server level and maintains a web site (www.tuxist.org) dedicated to giving back to the GNU/Linux community. His winning migration tips, which claimed the \$1,500 gift certificate, offer this detailed plan:

Linux Migration Tips Winner: David D. Scribner

Tip 1:

Before migrating any workstations over to GNU/Linux and the plethora of tools and utilities there, install cross-platform basic applications on the Windows workstations. These would include OpenOffice.org and Mozilla/FireFox at minimum and should be configured to replicate the users' setup for Microsoft Office and Internet Explorer (templates, configuration [paths, to name one], import Favorites, and so on). Also, configure areas of advantage (for example, OpenOffice.org defaulting to open/save Microsoft Word/Excel documents, Mozilla blocking pop-ups, loading tabs in the background, Mozilla Mail versus Outlook Express or Outlook).

For those who utilize more advanced OS features, applications, or tools, there is very likely an alternative in the Linux platform. If this alternative also has a Windows version, introduce users to this package, highlighting the advantages and allowing the user to adjust to the differences (if any).

This will let them get acquainted with the new applications, tools, and utilities while still using the OS they are comfortable with and allows you to highlight the advantages of the new applications, answer questions, and so on. You can assign this period of adjustment to any necessary length of time, but anywhere from six to twelve weeks is usually sufficient.

Tip 2:

Give employees training on the new applications, detailing how they can use them to accomplish the same tasks they achieved in the past. The training, which can be one-on-one or as a group, also gives you the opportunity to expound on why the switch is being made: to thwart vendor lock-in. Detail some of the facts regarding upcoming Microsoft operating systems and applications that, in the future, will make it increasingly difficult to switch.

Tip 3:

After the training and adjustment period with the cross-platform applications, tools, and utilities on the Windows platform, begin the transition rollout with the new Linux OS, applications, and utilities, starting with your users who have become the most accustomed to the new applications and feel most at ease with the migration. They can become your biggest cheering section and can help out with the migration of other users down the road by answering users' questions.

Set up the Linux desktops to closely resemble users' current Windows desktops, and configure the applications, fonts, and anything else they were using on the previous operating system identically (or as closely as possible, if an identical setup can't be accomplished for some reason). The migration may entail utilizing Novell utilities to allow for the continued use of select Windows applications that do not have GNU/Linux versions released yet or that require connection to an Exchange server and so on--at least until these, too, can be migrated to Novell SuSE Enterprise Servers.

The migration transition period can be split into two or perhaps three groups, with the most advanced group being the first to migrate. Allow a settling in time after each group migrates to iron out any remaining questions or configurations, and be sure to help cheerlead the users on their accomplishments, reinforcing the enjoyed security, lower total cost of ownership, and the company's refusal to bend to vendor lock-in.

As one group is settling in comfortably, you can continue to migrate the remaining group or groups next in line. As mentioned earlier, you will usually find that your first group to migrate will become instrumental in helping migrate the remaining groups. Take advantage of these members in helping drive the migration to success. Oh, and don't forget--for those who finalize the transition, reward them with a little recognition by giving them a small stuffed Tux for their desk! It's cheap compared to the cost of staying with Windows and just may help strengthen the ambition of others in line for the migration.

What do you think? In the talkback section immediately following this article, let us know if you believe David's ideas will fly, or what you would do differently. We received several other good tips, as this sampling shows:

Gene Anglen

Tip 1:

Choose a desktop distribution that has as little impact as possible on users with regard to the interface and access to the software program or programs they use. Some type of incentive should be used, such as replacing their current hardware with newer versions. This will help most of their applications run more quickly and smoothly, leading them to think that Linux is accomplishing the speed difference.

Research the differences your users will encounter and have a ready-made solution. One example is transferring files to and from floppy drives. Despite the current manufacturer trend, floppy drives are used by end users more than any other type of media. Be sure something like Mtools is installed with a desktop link for the user. This accomplishes two user issues: a "simple" way to transfer files, and users having files in two separate locations if the floppy disk they are using goes bad. Teach them that they must save their files to the local home directory, then transfer them to floppy and vice versa.

Tip 2:

Do not attempt to migrate everyone at once. Start with yourself. Use the desktop distribution as your own workstation and look at it from an end user's point of view. Then choose a few users for whom you have the least amount of service calls. Place new hires on the Linux systems as soon as they start, in the areas you have your initial Linux desktops running so your "old hands" can assist the new employee. Initially, you must run your old Windows systems in parallel with your new Linux desktops.

Promote the stability and security of the Linux workstations by mentioning that you have to interrupt the Windows users to perform updates and reboots or check their Windows systems to be sure the antivirus software is working and has the current signatures installed, while your Linux workstations are able to keep right on going without interruption. True, you have to do similar tasks on the Linux workstations, but very seldom do you have to interrupt users to accomplish this. Linux users don't need this pointed out to them; just allow them the satisfaction of thinking their Windows counterparts are being held up for a few minutes.

Since this was a contest, we had to view these as competing tips. But, in the true spirit of open source, most of the suggestions here build on one another and could be used together. So, although every contestant submitted the requisite three tips, we've omitted repeat ideas and offer individual recommendations that stand out:

Matt Yarbrough

Tip 1:

Document. Put together a summary listing every application your users use, not every application they *need*. Instant messengers, weather bugs, and music players will affect acceptance probably more than office suites or email clients.

Tip 2:

Education. Make sure your users understand the reasons for migrating. An arbitrary declaration of "the new thing" will not endear them to the effort. Explain the benefits to them, not the benefits to the IT department.

Sujan Swearingen:

Get the latest Linux kernel that the OS can handle. It's usually more stable and gives your hardware more functionality. Sometimes a piece of hardware that acts "flaky" has been fixed in the latest kernel.

Zenaan Harkness

Plan to use GNOME or KDE for users who are coming from Windows, since those tools are closest to the experience and comfort that users have with Windows. If the users aren't "tweak freaks" (or your company prefers less fiddling) go with GNOME.

Of course, our book editors had their favorite tip:

Glenn Hollowell

Have two books accessible to every Linux user. These are *Running Linux* by Matt Welsh et al, and *Linux in a Nutshell* by Ellen Sievers. A copy of *Unix Power Tools* will also be a valuable resource for users as they advance.

Unfortunately, we didn't receive any eligible entries in the Benefits or Migration Plan categories, but we heard your feedback loud and clear that limiting the contest to entries from the U.S. was a real problem. We do realize that there's a lot of great work involving Linux migrations in Europe, Latin America, and elsewhere. So here's your chance: in the talkback section below, share your Linux migration stories and the benefits your company (or clients) realized from this experience. How and why are you migrating to Linux on the desktop?

[Ed Stephenson](#) is a freelance writer who has worked with O'Reilly for more than four years.

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