

Enterprise Migration Planning

Whether it has been contemplated for a period of time or it has been thrust upon the enterprise, migration is not a simple or straightforward matter. Even if it involves just one key system, the preparations for the migration and the care taken in these preparations are the same, as if the whole enterprise including multiple systems were to be migrated. This is why MB Foster, in response to the November 2001 HP announcement, started a series of webinars outlining basic steps, which have to be considered when planning a migration.

What was the purpose of these webinars? Quite simply, it is the first in a series of steps, which need to be executed when a corporate migration is being considered. In reality, migrating of a portion of the enterprise is actually more complex than the development of the original application. While, it is true that circumstances, the level of complexity, the nature of the business and the complexity of the enterprise itself may vary, the fact remains - It is easier to build a house from the ground up, than to renovate, especially when you are living in it. So what are the accepted migration stages?

Stage 1: High-level overview.

The need for migration is identified. Major issues related to the migration are outlined. This is the stage most, but not all of the HP/MPE users are at now.

- To identify the possibilities open to the organization both in terms of business objectives and additional benefits which may have been overlooked in the past.
- To develop a high-level action plan for the next stages of the process.
- To start gauging corporate state of readiness for this process.

Different organizations will be at different stages of completion of this step. Some will already have plans for migration, some will not have even thought about it, and others will be somewhere in between. One thing is certain - each organization is unique with respect to their needs, targets, budgets and internal capabilities.

How can an overview help?

- For those who already have migration plans and have the IT staff to execute it, it is an inexpensive high-level review of the corporate plan without any future obligations.
- For those who have not developed a plan and/or do not have the IT resources required, it is a cost effective way to start the evaluation process.
- For those who have not even thought about migration, it is a simple starting point.

Stage 2: On-site Executive High-level Overview.

Based on the personal assessment of the individual enterprise, clients may participate in a one-day corporate presentation/workshop related to migration issues.

The main objectives are to jointly:

- Identify the corporate level of awareness as to the complexity of a migration and the expected outcomes.
- Identify the level of risk the organization is willing to accept, and the develop a risk mitigation plan.
- Determine the completeness of the corporate migration plan if it exists.
- Determine the corporate migration timeframe.
- Identify the corporate strategic directions in terms of new business drivers.
- Identify the corporate strategic directions in terms of new platforms and technologies.
- Identify the corporate level of commitment in terms of budgets, staff availability and other resources.

The stage starts with an executive-level presentation which outlines the strategic and tactical issues associated with migration, and progress to a facilitated review of the specific issues facing the company. This stage is wrapped up with a short written summary.

The written summary should:

- a) be organization centric
- b) outline the recommended process for this organization
- c) be based on information supplied by the organizations executive

Stage 3: On site Migration Evaluation.

The aim is to facilitate a successful client migration, to that end having access to a partner or a number of partners who are experts and leaders in their respective fields is a sure way to ensure that you receive the best possible service. It is therefore quite natural that each one of the assessment phases may be conducted by a different partner depending on their area of expertise, geographic location and specific client profile established in the previous steps of the process. The main phases of the assessment are as follows:

Application software assessment:

This assessment evaluates the following:

- Is the application off the shelf and can it be moved?
- Is the application home-grown and what are the options?
- Is the software selection process required and if so when?
- What is the status of the Data Architecture Model?
- What is the status of the System Architecture Model?
- What are the requirements for schema mapping.
- Is the business process and logic available? .
- What are the issues with data migration? E.g. mapping, conversion and reload.

- What RDBMS is the most compatible and who will do the selection?

System architecture and environmental assessment:

The purpose of this phase is to establish the key issues associated with the corporate impact of the application migration. It consists of but is not limited to:

- Operating system compatibility.
- System bridging requirements.
- Migration of scripts, jobs and batch jobs.
- Issues associated with logging, backup and recovery.
- Interfaces to other corporate systems and logic associated with information exchange.
- Audit and other reporting requirements.
- EDI or other extra corporate exchange requirements.
- Special corporate requirements such as data marts or data warehouses.
- Network connectivity and compatibility.

Hardware assessment:

Based on the business requirements and the software issues identified above, the hardware is evaluated for compatibility. The process will consist of, but is not limited to:

- Application server hardware evaluation
- RDBMS hardware evaluation
- Peripheral compatibility and additional requirements
- Network server requirements
- Requirements for additional/new router, bridges or switches and connectors
- Additional desktop requirements

As a deliverable of these three phases, a document outlining the proposed migration direction in terms of applications, RDBMS and hardware will be produced and delivered to the client.

While it is anticipated that these phases, in particular phase one and phase two, can progress in parallel, and that the total time for completion of all three phases should not be more than five to thirty five days, the actual times may vary, depending on the size and complexity of the enterprise,

Stage 4: Enterprise migration planning

A plan for the entire migration effort will be developed. It should address all aspects of the migration, such as, the standard system life cycle process including resource requirements, budgets, milestones and timelines. This phase will consist of, but will not be limited to the following:

- Project management context:
- Project management process
- Project integration management

- Project scope management
- Project time management
- Project cost management
- Project quality control
- Human resource management
- Project communication management
- Project procurement management

Stage 5: Delivery

The fifth and final stage is the execution of the migration plan.

It is not possible to document the process involved as these will be dependent totally on the nature of the plan which has been tailored to the client requirements.

All migration efforts will require a plan for moving the data to the new system; testing and training on the migrated (or new) application, and a plan for implementation and cutover to the new production system.

Stage 6: implementation

Finally the migration effort is complete and you are now ready to enter Stage 6: Implementation. This stage consists of but is not limited to the following:

- End-user training is completed
- All systems, applications and data are certified in production environment
- All external system interfaces are certified in the production environment
- Project is formally signed-off by the client
- Optional post migration review is conducted and the “go-live” event held

Every migration will go through these stages whether the solution is to buy, migrate, port or rebuild the applications. Success will largely be impacted by the completeness of the planning effort and anticipation of issues before they become a problem. Each stage of the migration project requires the co-operation and joint effort of the IT Group, the Senior Management Team and the End Users.

In this presentation I have only explore a portion of the multi-page checklist that we at MBFoster use in our migration business. We hope that we have provided some insight into the activities and risks involved in the migration, and implementation of replacement systems for e3000 applications.

Birket Foster Biographical

Birket Foster is Chairman and founder of M.B. Foster, a provider of data access and delivery solutions to the Hewlett-Packard community for over 25 years.

MB Foster is a selected HP Platinum Migration Partner. The company provides migration planning, services and tools to assist HP e3000 customers in their move to other

platforms, as well as proven data access solutions which drive mission-critical IT operations around the world. As a Certified Microsoft developer, an Oracle Partner, an IBM Business partner, and a Sun Development partner, MB Foster has a wealth of knowledge specifically focused on data – where all business logic and critical information resides.

The company is headquartered in Chesterville, Canada with offices in Texas, Washington, Ontario and British Columbia. For information on its distributors, products and services, visit www.mbfoster.com.

Birket Foster is a frequent presenter at domestic and international conferences. .