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Migration
Y2K was just a dress rehearsal

Birket Foster

CEO & Chairman
MB Foster

Agenda

1) Y2K Planning
2) HP e3000 Announcement
3) 3 Phases of a Migration
4) The 6 Step Plan of a Migration
5) What help is out there?

What did you do for Y2K?

- Who was responsible?

- Was there a plan?

- What were the tasks?
  - Inventory systems
  - Replace, remediate or keep
  - Testing process

- What was your deadline?

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This is the Real Thing

- You must understand the risk

- You must understand the consequences of decisions

- You must have a plan, budget and timeframe

- Senior management must be involved

- You can't afford to be wrong - CIO

The HP e3000 Announcement
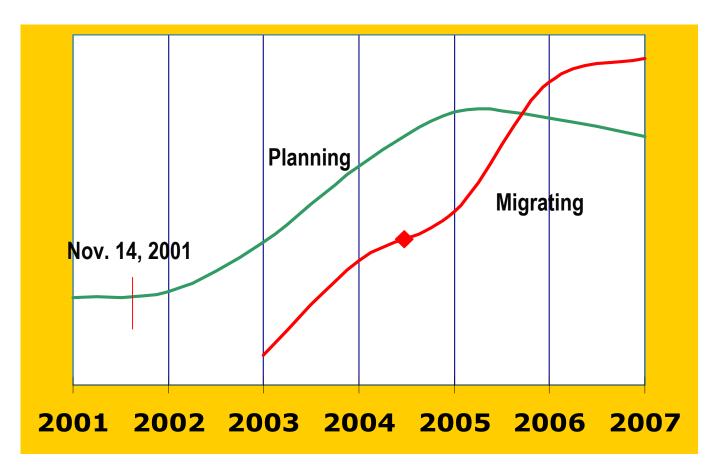
November 14, 2001

For sale until October 31, 2003

Supported until December 31, 2006
For details:
http://www.hp.com/go/e3000

Many changes since the announcement

Planning Vs. Migrating Trend

A line chart titled area showing two trend lines over years 2001 to 2007. A green "Planning" line rises to a peak around 2005 then declines. A red "Migrating" line rises steadily, crossing above the Planning line near 2006. A vertical marker labeled "Nov. 14, 2001" appears near 2001.

- **Planning**
- **Migrating**
- **Nov. 14, 2001**

2001 2002 2003 2004 2005 2006 2007

You are Past the Halfway Point

- Whether you homestead or transition, you need a plan

- Either way the plan identifies risks and validates the Business/IT alignment

- A plan helps meet Sarbanes Oxley and business continuity requirements

- You are NOT the first to migrate – there are organizations that specialize in migrations – Platinum Partners
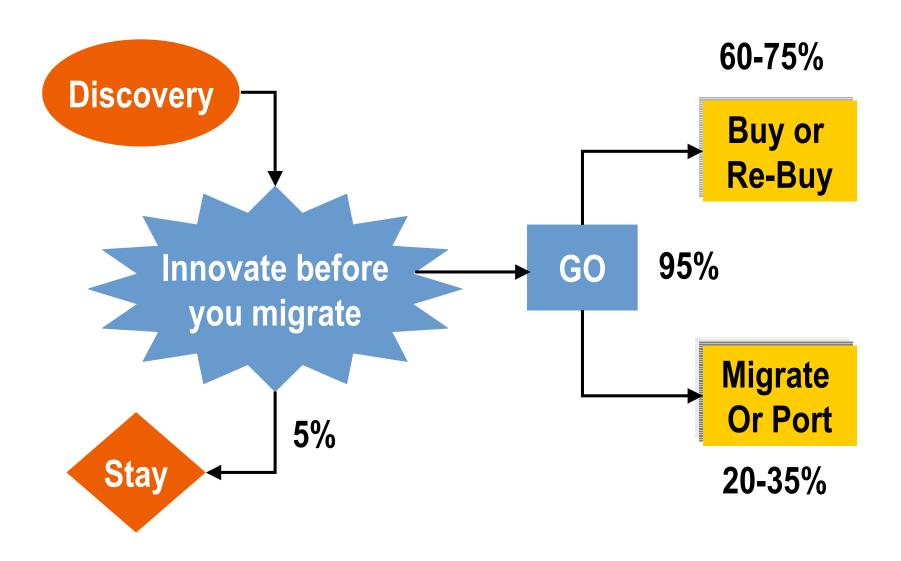
You May Be too Late

- Start with your 'GO LIVE' date and work backwards
- Time for testing
- Time for conversion/new application install
- Time for a test plan
- Time for familiarization/training
- Time to order the new infrastructure/software
- Detailed plan with budget and WBS
- Assessment/high level plan

Put the plan into the Budget Summer 2004

Start Project in Summer 2005 — 60 days — 30 - 90 days — 90 days — 30 days — 90 days — 120 days — Dec 31, 2006

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Discovery

Innovate before you migrate

GO 95%

Stay 5%

60-75%

Buy or Re-Buy

Migrate Or Port

20-35%

Innovate Before You Migrate

Projects that effect operational efficiency and ROI

Projects that build skills and experience

Projects that will help with year over year comparisons in future

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Project Management	**Transition Plan**	**Post Implementation Review**
	Software	
	Operating System	
	Database Conversion	
	Data Migration	
	JCL / Scripts	
	User Interface	
	Backup / Disaster Recovery	
	Training Plan-Users / Ops / Tech	
	Documentation	
	Hardware & Infrastructure	
Budget and Detailed Planning		

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Phases of a Migration

- Assessment
  - Choices
  - Decision Framework
  - Risk Profile

- Detailed plan
  - Plan → Who, What, Where
  - Budget

- Execution of plan

Assessment

- High level or strategic plan for the IT assets
  - Identifies business baseline & targets
  - Identifies applications that support the business
  - Identifies equipment, current skill sets involved
  - Documents risk, decisions required and high level budget

What Are Your Choices

- Depends on your business needs

- Depends on your application support

- Depends on your hardware and software support

- Staffing

- Legal

Decision Framework

- Who is your trusted advisor?

- What are the business needs and plans?
  - What is the business & technology baseline
  - What are the business & technology targets

- Application
  - What is used now?
  - What are the alternatives?

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Decision Framework continued

- Information Architecture
  - How is data captured, flowed, accessed, stored, and managed?
  - What is the data architecture?
- Technology Architecture

Your Risk Profile

- What responsibility does your organization have to customers, shareholders, government?

- Can you/will you be able to support the application, software and hardware beyond Dec 31, 2006?

- What is the cost profile for staying?

- Will the application need to evolve?

Detailed Plan

- All tasks identified

- Order & precedence established
  - Earliest start times
  - Latest finish times

- Duration estimated – industry standards

- Resources assigned
  - Staff or contractors

- Develop WBS (Gantt Chart/PERT chart developed)

Execution of Plan

- Form Governance team

- Review often – make the milestones

- Put changes of scope through a process

- Learn to say NO

- There is time for Phase 2

- Are there legal requirements for history on HP e3000

The 6 Step Plan of a Migration

1. Inventory systems
2. Inventory IT Skills
3. Plan Destination
4. Do 'GAP' Analysis
5. Plan the Work
6. Work the Plan

Step 1 – Inventory Systems

- What are the business processes?

- What applications do you use?
  - Does the application fit your future needs
  - Was the application bought or home-grown
  - Who supports the application
  - Are there connections to other systems?

- What connections to partners (transactions/reports)

Step 2 – Inventory IT Skills

- What does your staff know?

- What have they learned on their own?

- What platforms can your team support?

- What training are they currently taking?

Step 3 – Plan Destination

- What does the future vision look like?

- What business will you be in?

- How does the business process and the resultant workflow change?

- What is the functionality required?

- Who will do the software selection work?

- Choose Partners to help you!

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Step 4 – Do 'GAP' Analysis

- What is the application today?

- What would you like it to be?

- What is the technology infrastructure today, what does it need to be – or what you like it to be?

- What are the skill/knowledge levels now and required in the future?

- What is the TCO today, during and after?

Step 5 – Plan the Work

- Basic Project Management

- What Tasks?

- Who will be responsible?

- What are the dependencies?

- What is the duration?

- Schedule – Status points

Step 6 – Work the Plan

- Milestones for application selection

- Procurement of infrastructure

- Installation of new system and applications

- Training, training, training

- Run parallel

- Schedule for cut-over (s)

- 'Go Live' Party

Migration Success Factors

- How do you keep you business running while changing engines in mid-air?

- How to keep servicing your customers?

- How do you keep innovating?

- What will you need to ward off competition?

- How will this impact staffing?

- What about knowledge transfer?

- How will this be funded?

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Migration Partnering

- What to look for in a plan
  - Survey of current situation
  - Survey of COTS application features
  - Survey of staffing
  - Target for business
  - Target for technology
  - Funding for project

Application Software Selection

- What are the business processes?
  - Customer facing/partnering
  - Back Office (Accounting)

- What are the criteria for each department?

- Will COTS satisfy need?

- Who is leading the process?

- Trusted Advisor role?

- What is TCO envelope?

Migration Challenges

- Database

- Logic

- APIs/Interfaces

- Documentation

- Presentation/User Interface

- Language/Compilers

- ISO9000/FDA re-certification

- Licensing

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Co-Existence

- Running in Parallel
- Outsourcing the running of the Data Center
- Install and train on new system & infrastructure
- Cross platform data access
- Cross application transactions
- Plan for the cut over (phased?)

What Can MB Foster do to Help?

- Facilitate a Migration Audit

- Provide tools & expertise to free up IT staff

- Co-existence strategy

- Cross platform running in parallel
  – Transaction management

- Migrating Data

- Migration Assistance

Our Credentials

- Designated HP migration partner

- 27 years HP knowledge and expertise

- 20 years focus on Data Access and Transformation

- Professionals with lots of experience

- Experienced Team

  - More than 126 years of migration experience

  - 223 years MPE

  - 80 years HP-UX

  - 81$^+$ years Cognos experience

  - Architecture & DB Experience

- Planning Workshops

- One Stop for all the tools

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Facilitate a Migration Audit

- Work with your team to:
  - Inventory
  - Do Decision Analysis
  - Help with timetable
  - Assist in locating resources

Provide Tools to Free up IT Staff

- MBF-UDALink will allow your users to self-service data requests
  - We can design a DataMart for BI/reports
  - IT can design data access for extraction into spreadsheets, or reports that run on a schedule or on demand

- Reveal can allow electronic delivery of reports over the web for internal and external "customers"

Co-existence Strategy

- What if you could have both the new and old systems receiving the transactions as you transition to the new system?

- For on demand high performance reporting, MBF-Enterprise will allow cross platform data access

- MBF-UDASynch can be implemented to provide transactional integrity

Cross Platform Running Parallel

- What are the transactions?

- Which will be "system of record"?

- Transaction Management
  - How will you do it?

- Inter-application transactions

- External transactions

Migrating Data

- What data to migrate?

- What data should not migrate?

- How to handle history

- First load

- Cleaning data

- Summaries

- Final cut-over

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Migration Assistance

- 3 - 5 day planning workshop

- 5 - 10 day on site migration consulting, working with your team to identify the options for moving forward

- Identify resources required for success

- Assistance in staffing migration project

MB Foster Training

- Migration Emphasis
  - MBF-UDALink Product update
    - ODBC
    - MultiPlatform
    - JDBC, PDF, XML … And More
  - Low Impact Migration bundle
    - COBOL, ScreenJet, Eloquence, MPUX, Training for the bundle

Strategic Partners

Thank You

- Questions?

Contact:

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Or call us at (800) ANSWERS (267-9377)

'Your Success is our Success'

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