

Assessment, Planning and Surround Code

Ensuring your whole workflow is migrated

So you have finally decided on the “go-live” date, you have organized a migration team and are wondering how and what to organize to meet the date – this article is designed to help you through the process.

We have customers who have discovered the original estimate of resources for the planned move missed a large part of completing the migration. You see, they had figured that since a major application was going to be moved by the vendor [or sometimes replaced by the new vendor] that there wasn't much to do ... until time came to go live.

We Forgot the Surround Code

The application that is currently running often has interfaces to other applications or extracts and reports that make up the workflow for the organization. Since a reporting tool or data extraction tool was used, there was no consideration given to what it would take to move the extracts or reports. So as the new application was going live the CFO wanted to know where his data was for his forecasting system, the inventory manager needed his information and the sales folks wanted to know how they got the CRM fed. All these situations involve ‘surround’ code items that interface with the application, which feeds or is fed by data from the application.

Where to Start

The first stage is always to do an

assessment – a high level plan of what will be impacted in the migration. If you have already started this process, we can help by performing an Independent Verification and Validation (IVV) of your plan. Here at MB Foster we have helped many customers through the process of preparing a successful platform migration.

The assessment should produce a business baseline, a technology baseline and a skills inventory. Then a business target, a technology target and a skills requirement should be produced. From this a gap analysis can be developed to understand the work required to get the project completed.

Remember Surround Code, Training and Operational Documentation

Most of us are visual thinkers; so early on, a high level block diagram should be developed to show the applications and how they interface with each other and where they interface externally. It is not just the applications, it is also the data and how it is used, archived, reported and fed to corporate processes. Interfaces to tax, credit cards systems and other surround code must be taken into account. From a staffing point of view, the required skills and procedures to run and manage the new application will likely require training for end users, programmers and operations staff. Even writing scripts to automate certain

processes will differ between platforms. The backup plan will change, along with the disaster recovery/business resumption plan.

Assessment Deliverables

An MB Foster assessment engagement will categorize all these items and produce the high level plan for what has to get accomplished with a rough budget, a list of decisions to be made, the assumptions that have been made, the risks that must be addressed and recommendations. The report also includes an outline of the detailed plan steps. Costing for each step will take into account the work that can be done by the client as part of the preparation of the detailed plan.

About MB Foster

MB Foster, a provider of data access and delivery solutions for over 30 years is a selected HP Platinum Migration Partner. The company provides surround code migration, 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. As the Ecometry Surround Code Partner, Certified Microsoft Developer, an Oracle Partner, MB Foster has a wealth of knowledge specifically focused on data – where all business logic and critical information resides.

MB Foster's outstanding knowledge of the Ecometry environment allows them to provide second to none migration assistance, especially for non-Ecometry code (surround code). Ecometry specific webinars are available on demand to assist customers through the discovery of code that surrounds the application. Using their Ecometry expertise, MB Foster delivers fast, efficient and cost effective data mart solutions. 'Innovate before you migrate' – minimize the impact of migration and forge into the future by implementing a data mart.

The company is headquartered in Chesterville, Ontario, Canada. For information on its distributors, products and services, visit www.mbfoster.com.