

MB Foster White Paper

December 2001

Enterprise Migration

ENTERPRISE MIGRATION

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 the migration 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 recent HP announcement, started a series of webinars outlining basic steps, which have to be considered when contemplating migration.

What is the purpose of these webinars? Quite simply, it is the first in a series of steps, which need to be accomplished if corporate migration is being considered. In reality, migration of a portion of the enterprise is actually more complex than the commissioning or development of the original application. While, it is true that the circumstances, level of complexity associated with 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: Migration – 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.

Objectives:

- 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

Method:

It is a given that different organizations will be at different stages of completion of this step. Some organizations may already have had plans for corporate changes or migration, some organizations did not even contemplate this requirement, and some will be somewhere in between. Each organization is unique with respect to their needs, targets, budgets and internal capabilities. How can a generic webinar help?

It can help in the following ways:

- For those who contemplated the migration before 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 contemplated the migration but did not develop a plan or do not have the IT resources required, it is a cost effective way to start the evaluation process
- For those who did not contemplate any changes to their enterprise, it is a simple starting point

Stage 2: Migration – Executive, on-site, high-level overview

Based on the personal assessment of the individual enterprise, in a case where the migration is required and the proper plan is not in place, clients may choose to participate with MB Foster in a one-day corporate presentation/workshop related to migration issues.

Objectives:

Corporate level of awareness as to the levels of complexity and expected outcomes
Level of risk the client organization is willing to accept, and the risk mitigation plan
Completeness of the corporate migration plan if such exists
Corporate migration timeframe
Corporate strategic directions in terms of new business drivers
Corporate strategic directions in terms of new platforms and technologies
Corporate level of commitment in terms of budgets, staff availability and other resources

Method:

This offering consists of three phases. The first phase is an executive-level presentation outlining the strategic and tactical issues associated with migration. The second phase consists of the facilitated review of the specific issues facing the customer. This is followed by phase three, a short written summary provided to the client as a part of this stage. MB Foster is a part of a consortium of companies who are leaders in the HP/MPE-UX and other arenas, so the report mentioned would not be MB Foster-centric, but rather customer option centric. In short, it would outline what steps, if any, are recommended for this particular customer based on the facts outlined by the customer's Executive Group. If the recommendations are accepted by the customer, the next stage will commence.

Stage 3: Migration – On site migration evaluation

As mentioned before, MB Foster's aim is to facilitate a successful client migration, and to that end a number of partners who are experts and leaders in their respective fields have been assembled in order to provide 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 will evaluate, but will not be limited to the following:

Is the application off the shelf and can it be moved?
Is the application homegrown 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?
Requirements for schema mapping
Availability of the business process and logic
Data migration issues such as data mapping, data conversion and reload
RDBMS selection and compatibility

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 constraints identified above, at this stage the hardware compatibility and proposed evaluation is done. It consists 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

At this stage a plan for the whole migration will be developed. It will address all aspects of the migration. As such, it will address all aspects of the standard system life cycle process including- resource requirements, budgets, milestones and timelines. This phase will consist of, but will not be limited to as per PMI Standards Committee.

Project management context:

- Business objectives
- Project phases and project life cycle description
- Project stakeholders
- Organizational influences
- Key management skills

Project management process:

- Project overall process
- Process groups
- Process interactions

Project integration management:

- Project plan development
- Project plan execution control
- Change control

Project scope management:

- Initiation
- Scope planning
- Scope definition
- Scope verification
- Scope change control

Project time management:

- Activity definition
- Activity sequencing
- Activity duration estimating
- Schedule development
- Schedule control

Project cost management:

Resource planning
Cost estimate
Cost budgeting
Cost control

Project quality control:

Quality planning
Quality assurance
Quality control

Human resource management:

Organizational planning
Staff training and/or acquisition
Team development

Project communication management:

Communication planning
Information distribution
Performance reporting
Closure

Project procurement management:

Procurement planning
Solicitation planning
Solicitation
Source selection
Contract administration
Process closure

Stage 5: Migration - Delivery

At this stage the actual execution of the migration plan developed during Stage 4 takes place. It is not possible to specify generic steps, as these will be dependent totally on the nature of the plan developed.

Stage 6: Commissioning

At this stage the formal commissioning of the system(s) takes place. 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