

up-a-box™

Seamless migration to a newer IBM i



Introduction

Migration to a new IBM i machine is not a trivial exercise. There are a variety of fairly complicated subjects that have a bearing on how difficult the task will be. So, before signing the hardware contract with IBM, there is merit to fully investigating the threads of activity which will be needed to accomplish the project.

If your company does not have a very thorough plan, there will almost certainly be surprises that cause delay, generate (sometimes very substantial) extra cost, and disappoint users.

If your company asks Unbeaten Path to perform an up-a-box migration, we'll start with a very thorough analysis of your current environment. We'll then author a conceptual design for the project. That document will provide ample advance notice of project twists, turns, and surprises *before* the IBM contract is signed. Unbeaten Path's money-back guarantee of customer satisfaction provides a very strong reason to believe that your risk on an up-a-box project has been mitigated.

There is no such thing as a "typical" box migration project; the number of permutations and combinations of software/hardware attributes make each project unique. The pro-forma up-a-box proposal that follows below is structured for a fairly simplistic migration at a company that uses BPCS software. It's unlikely to be a good fit your company. Consider reading it if you'd like some insight on the types of issues associated with box upgrades.

Pro-forma up-a-box proposal from Unbeaten Path

Background Information

Cambiando Equipo, S.A. (CESA) will take delivery of a new IBM i model 9ww and has requested up-a-box consulting assistance from Unbeaten Path International (UPI) to move the relevant objects (programs, data files, etc.) from the existing 7xx machine to the new model.

New IBMs are now delivered with version 7 release 1 (v7r1) of the operating system. The version 7 operating system has major changes vis-à-vis version 5 releases. Therefore, as part of the migration process, all existing program objects must go through a conversion process. The conversion process will not execute for a given program object unless these two things are true:

1. The program object was created on v5r1 (or higher) of the operating system, and ...
2. When the program object was created, it was created as 'observable'

If either point #1 or #2 is not true, then source code must be recompiled on the new machine so as to re-create the object at the v6 level of the operating system.

IBM provides a group of analysis PTFs that can be loaded on your existing model 7xx. Those PTFs will perform an analysis over the current objects and produce reports that can be used to identify objects that will fail to go through the conversion process without a recompile. Analysis PTFs are available at the v5r4 level. Since IBM no longer supports prior releases, there are no analysis PTF groups available at those historic levels.

Pro-forma up-a-box proposal, *continued ...*



Preliminary information received from CESA

- ❖ The current 7xx machine is at v5r4 of the operating system and has one LPAR.
- ❖ The 9ww model will be delivered with operating system v7r1 and has one LPAR.
- ❖ The adequacy of CESA's current operating system configuration vis-à-vis best internal control practices is unknown.
- ❖ The current and new machines will be set up to communicate with each other or they will have compatible media devices.
- ❖ CESA has 3 BPCS v6.x environments that must be moved to the replacement box (production, test, and prototype).
- ❖ CESA will be responsible for obtaining the following two things from INFOR:
i) a valid BPCS key for the model 9ww, and ii) copies of the BPCS security programs compiled for v6r1 of the operating system.
- ❖ CESA does not have a software change and configuration management product running on the existing 7xx machine.
- ❖ The client does not have any other software packages running on the current machine (e.g. bar code, fax, etc.)

Description of deliverables – conceptual design phase

- ▷ Unbeaten Path will begin the conceptual design phase of the project by confirming the preliminary information that has been communicated by CESA
- ▷ The correct group of analysis PTFs will be installed and executed on the old box to identify objects that cannot go through the conversion process.
- ▷ Unbeaten Path will run **Bill of Health security diagnostics software** on the old box and review the report results to determine if any serious internal control vulnerabilities exist. After reviewing the Bill of Health results and UPI's recommended remediation steps, CESA will determine which internal control vulnerabilities will be remediated by UPI as part of the migration execution phase.
- ▷ Finally, a detailed migration plan will be developed and a firm quotation for performing the migration will be presented to CESA.

Description of deliverables – migration execution phase

- ▷ The current user profiles will be transferred to the new 9ww machine.
- ▷ UPI will remediate those operating system security vulnerabilities identified for attention in the detailed migration plan.
- ▷ The existing BPCS v6.x environment libraries will be transferred to the new machine. This transfer will include the existing BPCS user security settings.
- ▷ We will enable and support user testing of BPCS on the new 9ww machine. Problems discovered during the user testing process will be promptly and fully resolved.
- ▷ BPCS users' PCs will be adjusted to reference the IP address of the new machine.
- ▷ Re-transfer of the production data files to the new machine after user testing of the new machine is completed.

Pro-forma up-a-box proposal, *continued ...*



Tasks excluded from the project scope

- ▷ Installation of the hardware and connection to the network
- ▷ Removal of the old machine
- ▷ tbd
- ▷ tbd
- ▷ tbd

Project staffing and schedule

Mr. Bob Kohlendorfer, Unbeaten Path's General Manager of Technical Consulting will lead several Unbeaten Path technical consultants. Work will begin soon after the new machine is delivered; the expected delivery date is November 7th.

Unbeaten Path support will be provided by VPN connection. An on-site visit may be necessary if the data migration must be executed using media (e.g. tape cartridges) and there is no one at CESA who can shuttle media between the old and new machines.

Time estimates

Full analysis of the current system and the installation and execution of the analysis PTFs will be completed in the first sixteen hours. If the preliminary information listed on page one of this proposal are verified, then the total project should be completed with not more than 56 hours of billable effort.

Money-back guarantee of CESA satisfaction

Unbeaten Path has been in business for almost two decades and we've never received a complaint about the quality of our up a notch box migration services. Nevertheless, if CESA is not pleased with the quality of our efforts, then our professional services agreement promises that we'll rectify any quality deficit at no charge (or refund all the consulting fees if we can't solve the problem in a commercially reasonable way).

Professional service fees and recovery of out-of-pocket expenses

Our proposals include a rate per hour quotation and provide for full recovery of out-of-pocket expenses. If the entire project can be performed remotely, then out-of-pocket expenses are likely to be zero.

Software tools that can contribute to migration projects

Box migration projects can typically be accomplished without acquiring any software tools. The list of tools below is provided only for evaluation purposes. If a potential up-a-box customer determines that one or more of these tools could potentially provide useful functionality, then Unbeaten Path will arrange for a zero obligation, entirely free presentation and/or demonstration of that tool.

- ☑ **Locksmith**[®] archiving software will dramatically improve response time on the new 963 model machine. Furthermore, if the archiving project is performed on the old machine, then the only data that has to be moved from one box to the other during the cutover weekend will be current year data. The archived prior-year transactions can be moved either before or after the tight cutover weekend window.
- ☑ **Item Undertaker**[™] greatly facilitates the process of deactivating obsolete BPCS items. The product also searches the Item Master for items that merit a deactivation review.
- ☑ **By Invitation Only**[®] enables an exceptionally efficient review of authorities that currently exist for BPCS user profiles. Adjustments to user profile authorities are very easy to perform using this tool.
- ☑ **Bill of Health**[®] performs a thorough assessment of every conceivable operating system vulnerability. It produces a report that identifies each weakness together with a prescription for how to remediate that security issue.

If you are not currently on maintenance with INFOR

Before proceeding, we strongly recommend a telephone discussion with **Milt Habeck**, Unbeaten Path's Managing Partner. It's likely that he can provide a few fresh insights about the "getting a key for the new box" process. This is typically a very complicated and expensive subject.

Questions ?

It would be a privilege to answer any questions about our **up a notch** consulting services. Here's Unbeaten Path International's contact information:

Toll free North America: (888) 874-8008

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Send us an email ([click here](#))

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