ActiveBatch

ADVANCED SYSTEMS CONCEPTS INC.

Migration Planning Kit

Everything you need to plan your migration from a
Legacy Scheduler to a modern IT Automation solution.

www.ActiveBatch.com

This Migration Kit Will

Provide you with an expert guide on how best to approach a migration from a legacy scheduler to a modern IT Automation solution.

Detail the automated migration process from start to finish, defining project deliverables and expected requirements from both the solution provider and the user organization.

Getting Started

Let's start off with a quick recap of our first White Paper, "The Definitive Guide to Migrating from Your Legacy Scheduler to a Modern IT Automation Solution", explaining why Legacy Schedulers aren't designed for change and the benefits you can achieve in using automated migration tools and services.

Get the Migration Guide!

The Definitive Guide to Migrating From Your Legacy Scheduler to a Modern IT Automation Solution

Why Legacy Schedulers Aren't Designed for Change

IMPACT OF LEGACY JOB SCHEDULERS

Increased Cost of Operations

Decreased IT Service Levels
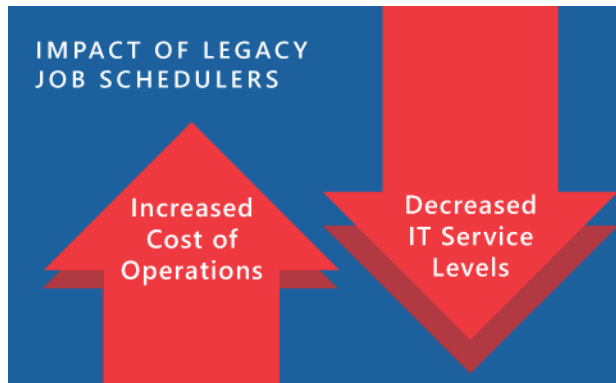
While modern workload automation solutions are stepping up to face the challenges of today's complex IT environments, most organizations still employ legacy schedulers for their automation needs. Legacy schedulers require common IT and business workflows to be hard-coded by senior-level developers who are already a scarce resource within the IT organization. Legacy schedulers erect barriers to the modification of existing IT operational and business processes, thereby increasing operational costs and lowering IT service levels to the business.

Legacy schedulers tend to rely heavily on scripting. Scripting tends to require resource level expertise in both the scripting language and the underlying technologies at hand. Moreover, scripting tends to reinforce a point or elemental solution rather than an architectural approach. After all, a script is developed to solve a particular problem rather than address a broad set of requirements and issues.

LEGACY SCHEDULERS REQUIRE SCRIPTING WHICH **INCREASES**

- Need for Senior-Level Resources
- Manual Errors
- Time to Implementation

Most organizations with legacy schedulers experience problems for years, but are wary of the risk, costs, and time commitment the migration to a new IT automation solution would require. A manual migration, for most organizations, would be deemed too risky. Migrating each of the hundreds or thousands of objects would be time consuming and error-prone. An automated migration addresses these concerns as it lowers risk, significantly improves accuracy, and provides a proven and reliable way to migrate your existing processes to your new solution, enabling a faster time to deployment and faster time to ROI.

An automated migration also provides an extra layer of security as organizations benefit from the in-house technical expertise provided by the solution provider during the migration process.

BENEFITS OF AUTOMATED MIGRATIONS

- Reduced **Risk**
- Improved **Accuracy**
- Shortened **Deployment Time**
- Reduced **Time to ROI**

TRUSTED & PROVEN MIGRATION METHOD

Migration Services for:	Migration Tools for:
• CA AutoSys	• Cron
• Cisco Workload Automation (Cisco Tidal)	• Task Scheduler
• IBM Trivoli	• SQL Server Agent

AND OTHERS

Advanced Systems Concepts' Professional Services organization has years of experience advising and performing automated migrations for customers around the world, and has developed a trusted, proven migration method for a variety of legacy systems that include, for example, Cisco Tidal, IBM Tivoli Workload Scheduler, and CA Autosys, as well as point scheduling tools like Cron, Task Manager, SQL Server Agent, and more.

In the next few pages, we'll take you through the steps of an automated migration and provide you with a checklist for how to plan your migration.

Migration Checklist

Phase #1: Pre-Planning and Assessment

Once you've decided to migrate to a modern IT automation solution, you need to spend some time planning out your migration strategy and designing a process for implementation. A necessary part of the pre-planning phase is to take an audit or inventory of your existing workflows and objects so that you have a complete accounting of all the different processes and workflows that will need to be migrated over to your new solution.

☐ ### Step #1: Document Objectives and Success Criteria ⬅

Internally, take the time to outline your goals for the project and what you expect to achieve with your new automation solution. Determine tasks your organization will need to complete before the migration and a timeline so that you can reach your goal deployment date. For example, when you do a Proof of Concept with a vendor, generally the vendor will take the use cases you provide them with to demonstrate how the solution works. Based on the knowledge gained from these use cases, the vendor can be a useful resource for anticipating or eliminating any potential bottlenecks in the migration process.

☐ ### Step #2: Perform an Inventory of Your Existing Automation Suite ⬅

Before you approach a migration, take an inventory of the existing objects and workflows in your legacy scheduler. Performing a self-audit of this kind will help you understand how many objects you will need to transfer in the migration process and the time commitment you should expect during the migration.

☐ Step #3: Develop a Statement of Work and Assign Responsibilities ◄--------------

☐ Before you agree to an automated migration with a solution provider, the solution provider should work with you to develop a clear Statement of Work that fully outlines your responsibilities during the migration process and the provider's responsibilities

☐ A Statement of Work should be flexible and most solution providers will take on more or less responsibility depending on what the customer desires. For example, a Statement of Work can include services such as:

☐ Installation

☐ Custom Development

☐ Best Practices

☐ Knowledge Transfer

Etc...

☐ Additionally, automated migrations are often warranted for a certain amount of time. If this is not already a provided service, you should consider negotiating this into your agreement.

Step #4: Prioritize Workflows or Jobs that will be Moved First

Organizations generally take two different approaches to prioritizing and migrating workflows depending on their automation needs.

1st Approach

Prioritize workflows that are used most frequently or most critical to the business and migrate them first, with the less critical, internal workflows transferred after this is complete. This approach is good for organizations who are looking to get an immediate return on their automation investment and want to start off their migration with the big ticket items first.

2nd Approach

Migrate your internal or less critical workflows first, followed by higher priority ones. Using this approach, organizations can minimize the risk of problems occurring to their most important workflows in the transfer, but they also take the longest time to get to the biggest piece of their IT or business environment.

☐ Step #5: Create a Timeline for Training and Implementation ◄┄┄┄┄┄┄┄┄┄

Automated Migration 1 Week +	With an automated migration, the migration aspect itself, which involves the conversion of objects from the legacy scheduler into the new automation solution, typically takes a week or so.
Training / Testing Multiple Weeks	The majority of time spent after the migration but before deployment to production is: 1. Learning the capabilities of the new software. 2. Training the support and operational teams. 3. Performing the necessary Quality Assurance on all workflows to ensure they produce the expected results. Remember! You are also creating new environments using the new IT Automation tool. In many organizations, there are at least three (3) environments: **Development ➡ Quality Assurance/Test ➡ Production**
Deployment to Production Multiple Weeks	Depending on the total number of jobs and workflows, the entire process from the start of the migration to production can take weeks to several months.

☐ With any complex project, there are many interdependencies among phases and tasks. When approaching a migration, it is important to identify dependent in order to avoid delaying project completion. For example, we have worked with many customers who have taken a consecutive approach to their automated migration, in which users will attend training at the start of the automated migration so that by the time the objects are migrated, users can go in to test workflows and test new capabilities they learned about during training.

Phase #2: Implementation

The Implementation phase is focused on installing the new solution and using the features and capabilities of the new solution to build workflows according to your business requirements.

This phase is focused on:

- ☐ Learning about the product
- ☐ Testing the migrated objects in your new automation environment
- ☐ Configuring new objects and workflows

Depending on the legacy scheduler you have in place, the migration process may vary slightly. Typically, you will need to:

☐ Provide a database of your organization's existing objects to the solution provider.

☐ The solution provider will migrate existing objects into the new solution via a command line program that will output an .xml file to be imported into the new automation solution.

☐ The solution provider will supply you with supporting documentation.

☐ You will need to test the new system with jobs and workflows.

Step #1: Install a New Automation Solution ←

Installing the new automation solution can be provided by either the customer or the solution provider. Unlike legacy schedulers, a modern workload automation solution should take minutes to install and should have a simple, graphical user interface that is easy to use right from the start. Installation typically includes the Scheduler and various execution agents to be installed on user machines.

Step #2: Automated Migration ←

Step 2 of Implementation involves the actual automated migration. This is performed by the solution provider, who will take the database of existing objects provided, and import them into the new automation solution. Since there will be differences between your legacy scheduler and your new workload automation solution, certain properties of objects may not be migrated over, and some manual work may need to be done to match your existing objects. For example, for security reasons the entry of passwords for user accounts typically needs to be performed manually by the customer.

Step #3: Attend Training

Instead of waiting for the automated migration to finish before you get started on the next step, we recommend you attend training courses while the solution provider is performing the automated migration. Coordinating training with your automated migration reduces the length of the implementation phase and helps you become familiar with the product so that when the automated migration is finished, you have a better understanding of the system and can better utilize the new capabilities you have.

LAMAR

"The training courses are very helpful. When I first started, they reduced the learning curve and got me up on my feet very quickly."

- *Edgar Kirchem, MIS Operations Manager, Lamar Advertising*

Read the Lamar Success Story >>

Step #4: Test/QA and Configure Your Environment ←

☐ When the automated migration is finished and you have attended training, it's time to test the new system and configure your environment. Testing responsibility generally falls on the customer because the customer is most familiar with the user system and their individual environment.

☐ We recommend parallel testing and running your legacy system side by side with your new automation solution for a period of 30 to 60 days. At the end of the time period, if the new automation solution is running migrated jobs the same as in the legacy system, you can decommission your legacy solution and go full force with your new solution.

☐ We also recommend creating some new objects and workflows, outside of what you've migrated, because in the event any issues arise, you will have the solution provider's consultant on hand to help solve the problem. Consultants can help identify how existing workflows would be updated or made more efficient to fit the goals of the company.

Step #5: Review and Documentation ←

During the final review, the solution provider's professional services team will conduct a review of its work and provide documentation on the work done, as well as identify Best Practices moving forward. Documentation is particularly useful because when you need to contact the solution provider's Support department, the Support department can refer back to the Documentation to get a better understanding of what work was done and how to approach issues moving forward.

Phase #3: Post-Migration

Once your migration is complete, you can take a variety of actions to ensure you are getting the most out of your new automation solution. Attending advanced classes that dive deeper into the product and the more advanced features or capabilities available can help maximize your investment. Additionally, post-migration is an ideal time to really focus on building out new objects and workflows using the new capabilities you now have with your modern automation solution.

With the rapidly changing needs of technology and business, transitioning to modern workload automation is a must for organizations. While migration is a challenge and an adjustment for organizations, the costs of not moving into modern workload automation could prove damaging.

Advanced Systems Concepts' Professional Migration Services allow organizations to quickly and reliably migrate to a new automation solution. ActiveBatch consultants help plan and execute the migration from start to finish, offering in-house technical expertise and access to engineers, etc.

Get the Definitive Guide to Migrating from Your Legacy Scheduler!

Get answers to these questions and more!

- ✓ Why are Legacy Schedulers not designed for change?
- ✓ What are the benefits of using automated migration tools and services?
- ✓ How can migrating from my Legacy Scheduler:
    - ✓ Increase IT agility
    - ✓ Mitigate risk
    - ✓ Reduce total cost of ownership
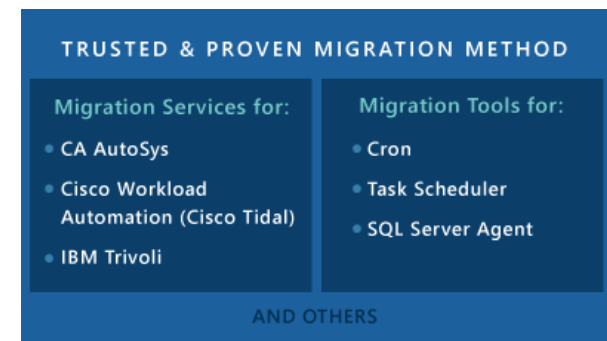- ✓ What are the 3 Strategies for a successful migration?

ActiveBatch®

The Definitive Guide To:

Migrating From Your Legacy Scheduler To A Modern IT Automation Solution

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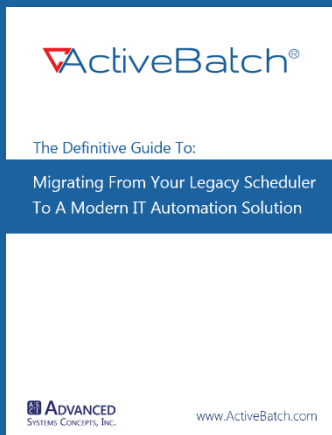
Get the Guide! ▶

Ready to Learn About Your Migration Options?

It's time to demand more from your automation!

With Advanced Systems Concepts' trusted and proven migration method, the opportunity for migrating from your Legacy Scheduler to an industry leading IT Automation solution has never been better!

TRUSTED & PROVEN MIGRATION METHOD

Migration Services for:
- CA AutoSys
- Cisco Workload Automation (Cisco Tidal)
- IBM Trivoli

Migration Tools for:
- Cron
- Task Scheduler
- SQL Server Agent

AND OTHERS

Let's Talk! ▶

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