



# Migrating To *Wise* From Information Management (InfoMan)

*infraWise*

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## Introduction

Planning a change to your service management software is a major undertaking requiring a good migration strategy. This paper will assist you in your planning by providing strategy guidelines specifically written for the *IBM Tivoli Information Management for z/OS* product and **all** of its predecessor versions (*Information/Management, Information/System, Tivoli Service Desk for OS/390*), all of which can be grouped together commonly referred to as InfoMan. Worksheets are provided in the appendixes of this document to assist you in your planning.

If, at any time, you have questions or would like infraWise to assist you in planning your strategy please don't hesitate to contact us at any of the following:

- Sales, infraWise Development Center, Cary, NC – 919-460-7447
- Sales, infraWise Corporate Headquarters, Chicago, IL – 312-726-7587
- [sales@infrawise.com](mailto:sales@infrawise.com)

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## Making an iWise Choice

This paper covers the following topics:

- **Converting** your existing InfoMan applications to the iWise GUI/Web solution
- **Replacing** your existing InfoMan applications with the iWise Application Suite

Depending on your situation, there are documents that will provide additional information that may be useful to your planning and decision process. Please contact your infraWise sales representative for copies of these documents or go to our Web site – <http://www.infrawise.com/downloads.php> to obtain copies in Adobe PDF format.

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## Windows and Web Access<sup>1</sup>

In planning your migration strategy, you must determine which of your current users will access the applications from the Windows desktop or via a Web browser. Once Information Management applications are converted, the iWise Solution will allow you the choice. Using the iWise Web Client will allow similar functionality, without having to recode any of the applications in Java or HTML. Refer to *Appendix B - iWise Architecture* for a description of how iWise is designed to support all of the various access methods.

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<sup>1</sup> The iWise Application Suite is also available as a set of native 3270 InfoMan applications for those companies that wish to retain the InfoMan architecture and need an ITIL compliant fully integrated application set.

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## Managed Service Provider (MSP)

InfraWise can provide a hosting service for your applications that relieves the burden of supporting the hardware and software environments by your company. If you choose this service, infraWise will be responsible for all of the initial and on-going hardware and software installation and maintenance.

If you would like to learn more about a potential iWise MSP solution, please contact your infraWise sales representative.

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## Staffing Requirements

Migrating service management applications to another solution is a complex task involving varying levels of staff involvement. See *Appendix H – Staffing Requirements* for a list of staff and skill sets.

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## Conversion Considerations

The iWise application suite is available for two different database environments:

- **iWise Distributed** – Windows GUI / Web with a non-InfoMan database
- **iWise for InfoMan** – Windows GUI / Web utilizing the InfoMan mainframe database

Hardware and software requirements for the components of each environment may be found in *Appendix A - Installation Requirements for iWise*.

The tables below show the tested and supported databases for the iWise environments<sup>2</sup>:

<b>iWise Distributed</b>
Sybase
Oracle
MS SQL Server
DB2/UDB

<b>iWise for InfoMan</b>
IBM Tivoli Information Management for z/OS or earlier InfoMan version

Once you have selected the appropriate environment, your next consideration is that of application, interfaces and data migration. For applications, infraWise provides the following options:

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<sup>2</sup> Database certification is an ongoing process. You should check with your infraWise Account Representative for the most up-to-date list of database certifications.

- Replace the existing applications with the iWise Application Suite
- Convert the existing InfoMan applications to iWise

## Replace existing applications with the iWise Application Suite

This option provides the capability to replace all of your existing Enterprise and Systems Management applications that are based on InfoMan, with the iWise Application Suite. The iWise application suite is an ITIL compliant integrated set of applications comprised of the following management disciplines:

### iWise Integrated Application Suite

<u>Process Management</u>	<u>Support Management</u>
Incident Management	Policy Management
Problem Management	Service Catalog
Change Management	CMDB (Configuration Management)
Request Management	Knowledge Base
Asset Management	Service Level Agreements (SLA)
Enterprise Release Management	Automation Policies
Human Resource Administration	
Customer Relationship Management	

The iWise applications can be further tailored to include functions that your customized applications may contain that are not part of the standard iWise suite.

The major area of work to be considered with this option is that of the migration of your existing InfoMan record types into corresponding iWise formats. To support all of the applications integration and functionality, iWise uses a significant number of attributes (data fields) that may not have an equivalent in your existing applications. This issue should receive special consideration.

iWise validates all data fields, thus preventing inconsistencies in the database. Unless your InfoMan system has always enforced strict validation guidelines, your existing database may contain a variety of entries for a given attribute that may or may not be accepted today. For example, some records may contain phone numbers or location codes which are no longer valid.

Making the transition involves the following:

- Determining if iWise has matching applications to the existing InfoMan set and if gaps exist.
- Determining if all of the business functions in the existing applications can be provided within iWise or if additional functions will be required.
- Determining if the external interfaces should be converted to work with iWise and if so, whether a rewrite to current interface languages (XML, REXX, etc.) will be required or desirable from a support perspective.

- Providing data mappings of the existing application record types (i.e., problem, change, request, etc.) to the equivalent iWise types.
- Determining the termination requirements of any license agreements with other vendor(s) and the potential impact on project dates.

## **Convert existing InfoMan applications to iWise**

You must choose whether you will retain your InfoMan environment or convert to the iWise distributed architecture. The choice of your database environment will decide this issue. Retaining the InfoMan database may require annual maintenance payments for two software products, when only iWise would be sufficient. On the other hand, license issues and costs may make the InfoMan database the most cost effective solution.

iWise can provide the same application functionality as InfoMan, while utilizing the same database architecture, with Windows client and multi-platform Web accessibility. Web access is accomplished without the loss of any of your business logic (TSPs and control panels) and without having to re-write any of your existing business logic in Java or HTML.

iWise protects your investment in InfoMan by providing an application migration path, and preserves the contents of your database.

The visible component of your application is just one item to consider. The processing logic of most InfoMan applications is controlled with TSPs and Control Panels; if poor coding techniques were used, some TSPs may have to be modified or re-written to permit a smooth conversion to iWise. At a minimum, the TSPs and Control panels will have to be reviewed prior to converting to iWise.

### **Determining What Applications and Functions Can Be Converted**

The next step is to determine which applications you wish to convert. The visible standard InfoMan applications that involve basic data entry, search and retrieval panels will be easily converted. The following non-visible related application functions/processes should also be considered as part of a migration plan:

- Service Level agreements
- Support rules (approvals, escalation, assignment, etc.)
- Outage calculations
- Relational lookups
- Interfaces to external products
- Object creation from existing objects
- Attribute validations
- Object ownership

- Application authorizations

Your applications may have specific functions and interfaces that are not candidates for conversion to the iWise architecture. In these rare circumstances, infraWise will make every attempt possible to determine whether the functions and processes are convertible, and if they are not, offer suggestions on how other suitable functions may be substituted.

## **Migrating to iWise From Other Service Management Applications**

If you have decided to evaluate the possibility of replacing your current service management applications, your reasons may vary, but likely some of the following points have caused you to consider an alternative:

- You would like to combine multiple service management applications/tools into a single solution
- Your current service management application no longer meets your requirements
- You would like to offload mainframe processing to a client/server environment
- Business application standardization requires that all applications must be accessible from the Web.
- You are merging multiple helpdesks
- You need to replace 3270 green screen applications with a Windows GUI/Web solution

For whatever reason, migrating from your existing environment to iWise involves many processes and occurs over a period of time. You must decide if you want to make an immediate cutover or transition to iWise in a phased approach. If you transition incrementally you will need to run iWise parallel with your existing application(s), and possibly share some data during the transition process.

## Interfaces to External Products

Your InfoMan applications may have interfaces to these commonly used tools:

- NetView
- Rational
- HP OpenView
- CA Unicenter
- Tivoli Enterprise Console (TEC)
- Microsoft SMS
- BMC Patrol
- Microsoft Office
- Others

During a migration to iWise, these interfaces may also need to be converted.

For mainframe interfaces, iWise Host Middleware provides the interface point between the iWise Client/Server and the mainframe applications. The iWise Host Middleware provides the iWise Object Interface Adapter (OIA) that allows you to convert your existing interfaces to the iWise OIA structure. OIAs are coded in open source REXX. If you have the iWise Host Middleware installed, you may convert your interfaces **before** you convert the visible component of your applications. Once you have converted the visible component (panels) and migrated from the InfoMan database, changing your interfaces to store data in the iWise relational database is as easy as changing a data value in the iWise Host Middleware code.

An interface with any client/server application requires the target application to have an open API or to use standard interfaces such as XML. If you need information regarding client/server interface solutions please contact the infraWise Support Center.

A worksheet that assists you in describing your interfaces is provided later in this paper.

## Data Conversion

Migrating from any application to the iWise solution involves transferring the data from your existing application to iWise. The following are the primary tasks associated with any migration of application data.

### External Data Mappings

Every application, including iWise, has its own unique set of objects and attributes. Mapping the external application data to corresponding attributes

in iWise is a critical task. You may not find a one-to-one attribute relationship between other service management applications and the iWise data model. In addition to the objects and attributes that make up each application, you should consider the following related data items for each InfoMan record:

- Journal (history) data
- Free form text
- Date formats
- Validations

### **External Data Extractions**

It aids the conversion tasks if your current service management applications offer data export facilities such as an export to an external file of data for each object type, an ODBC or XML interface.

### **External Data Extraction Clean-up**

In many cases iWise validates data as it is entered or updated. infraWise has found that many systems and tools **do not** enforce data validation, thus allowing data inconsistencies to occur.

Considerable time may be spent manipulating the data extracted from other applications. iWise contains a number of *required* attributes that may not have an equivalent value in the external source; iWise permits you to provide defaults for these attributes. You may then use the iWise Mass Update facility to alter the contents of these attributes from the specified default values to more appropriate choices.

### **Conversion Routines**

Once you have cleaned up the external data sources, you may then update the data load OIAs (Object Interface Adapters) supplied with the iWise Knowledge Base. OIAs are open source REXX-based utilities that allow you to create, update, or delete object data in the iWise database. Over 70 pre-defined OIAs are shipped with the iWise product.

### **Loading Test Data**

A sample extraction file should be the first file that you convert. This allows you to debug any errors in the REXX OIAs and verify that data mappings are correct. Once you have proven the external data and corresponding REXX OIAs are correct you can proceed with a full data load.

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## **Understanding the Current Environment**

The migration team must understand all aspects of the structure surrounding your applications, including:

- Applications
- Interfaces
- Userexits
- TSXs
- Reports

## Applications

If you have applications that were developed in-house, the migration will require a similar application in iWise.

Please use the worksheet provided in *Appendix C Application Worksheet* to describe the application. You may copy as needed.

## Interfaces

What interfaces to external products have been developed with your existing service management application? If an interface must be converted, infraWise must perform a complete evaluation of the existing interface and the function it performs. Once the evaluation is complete, infraWise can provide a cost and time estimate for the conversion activity. Without this evaluation, infraWise cannot determine whether the existing interface can be ported to work with the iWise architecture, or if it must be completely rewritten. As described earlier, you may convert your interfaces before you convert the visible component of your application.

Please use the worksheet provided in *Appendix D – Interface Worksheet* to describe the function performed by the interface. Use one copy per interface.

## Userexits

Are you using vendor-supplied exits or have you developed them in-house?

If you have developed any userexits, infraWise must evaluate them to see if any existing iWise exits can perform the same function or produce the same result.

For InfoMan users, all of the functions performed by both the InfoMan userexits and the Terminal Simulator Userexits (TSU) have been incorporated into the iWise architecture. The iWise architecture also provides an Object Interface Adapter (OIA) facility for any user-developed interfaces. User-defined OIAs are coded in the REXX language; the product also supplies over 75 pre-written routines that can serve as models.

Please use the worksheet provided in *Appendix E – Userexit Worksheet* to describe the function performed by the exit. Use one copy per userexit.

## **TSXs**

If you have TSXs developed in-house, the TSX will require a similar function in iWise.

Please use the worksheet provided in *Appendix F - TSX Worksheet* to describe the function performed by the TSX. Use one copy per userexit.

## **Reports**

Your existing reports will also participate in the migration; all reports must be replicated in the iWise application.

Please use the worksheet provided in *Appendix G Report Worksheet* to describe the report. Use one copy per report.

## **Help Files**

Any Help or message panels built for InfoMan will be converted as part of the panel conversion process.

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## Preparing for the Migration

### Server Requirements

Once you have chosen a migration path, you must determine your hardware needs. In its most extensive form, iWise requires the following:

- Database Server
- Transaction Server(s)
- Application Server(s) – (for Web access)
- Desktop Clients (Windows and Web browser access)
- Web Server (Java applet and HTML Help)
- Minor Space on a File Server (iWise executables)

Specific requirements may be found in Appendix A, Installation Requirements for iWise.

### Installing the ODBC-Supported Database

If you are migrating from the InfoMan database, you will need to install an ODBC-compliant database. iWise requires an ODBC-supported database for data, panels, and rules.

The following table will help you determine your needs:

Do you want the database component to reside on a mainframe, Windows Server, or Unix server?	
What database do you want to use? <ul style="list-style-type: none"><li>• Oracle</li><li>• Sybase</li><li>• MS SQL Server</li><li>• DB/2</li><li>• Other _____</li></ul>	
Number of Users? <ul style="list-style-type: none"><li>• Concurrent</li><li>• Casual</li><li>• Total</li></ul>	

What is the user mix across geographic locations?	
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## Installing the Proper Software Service Packs

Before installing the iWise software (framework and applications), you must ensure that your operating and database environments are up-to-date with required maintenance or service packs. The *infraWise Installation Guide* documents the latest support and service pack levels required at the time of its publication.

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## Testing

Most migration strategies include parallel testing to ensure the new form of the application produces the same results as the previous version. Panels and dialog flows are not the only objects that must be tested; you must also ensure that reports and interfaces to other applications produce the same results.

### System Administrator Testing

System administrators will be charged with maintaining the supporting functions of iWise. This includes:

- System administration
- Database administration
- Application administration

### Testing the Converted Applications

After your applications have been converted, a thorough test must be performed to ensure that all aspects of the application function the same way as the InfoMan application. Testing involves the following:

- System startup
- Profile settings
- Navigation of the panel
- Every attribute and related HELP
- Drop-down lists
- Option selections
- Icon functions
- Reports
- User and system documentation
- Backup and recovery procedures
- System hardware maintenance procedures
- Load and stress testing

## **Parallel Testing**

- Comparing the results
- What to do when results do not match

## **User Acceptance Testing**

After you convert your applications, we recommend that you turn them over to the user community to perform user acceptance testing. Although the applications should perform the same functions, there will be behavioral differences due to platform changes if nothing else.

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## Training

Training is a critical step in the migration process. Training accomplishes two things – (1) user familiarity and (2) actual application testing before the transition to production. Both are of equal importance. Users who are familiar with the application’s new look and feel will easily make the transition to production if they are comfortable with the applications **before** the transition. System administrators will also more readily accept the new system once they are familiar with the administrator responsibilities and have had a chance to exercise those duties.

### Support Staff Training

Items in the Staffing Requirements (*see Appendix H – Staffing Requirements*) list may require additional education for your staff. Because of the complexity of many of the requirements, it is unlikely that any one person can provide the proper level of expertise.

### User Training

After you convert your applications from InfoMan to iWise, some user re-training is required. Although the applications behave similarly, there are differences in their presentation and navigation methods. Your users should also have basic knowledge of Windows before attempting to increase their knowledge of iWise.

### Administrator Training

For companies making the transition from InfoMan to iWise Client/Server, your existing system and application administrators will require additional training in the functions and methods of the iWise architecture.

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## Performing the Migration

The final step in the migration path is the actual transition to production. With careful planning, adequate testing and training, this step should be painless.

The final preparation steps are:

- Back up everything associated with the applications in both environments
- Run the final conversion of the database
- Rebuild and refresh all tables and summary objects
- Activate the system activity monitors

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## Appendix A - Installation Requirements for iWise



**NOTE:** Before you install new software on a computer, it is always a good idea to consult your operating system's instructions and backup critical data.

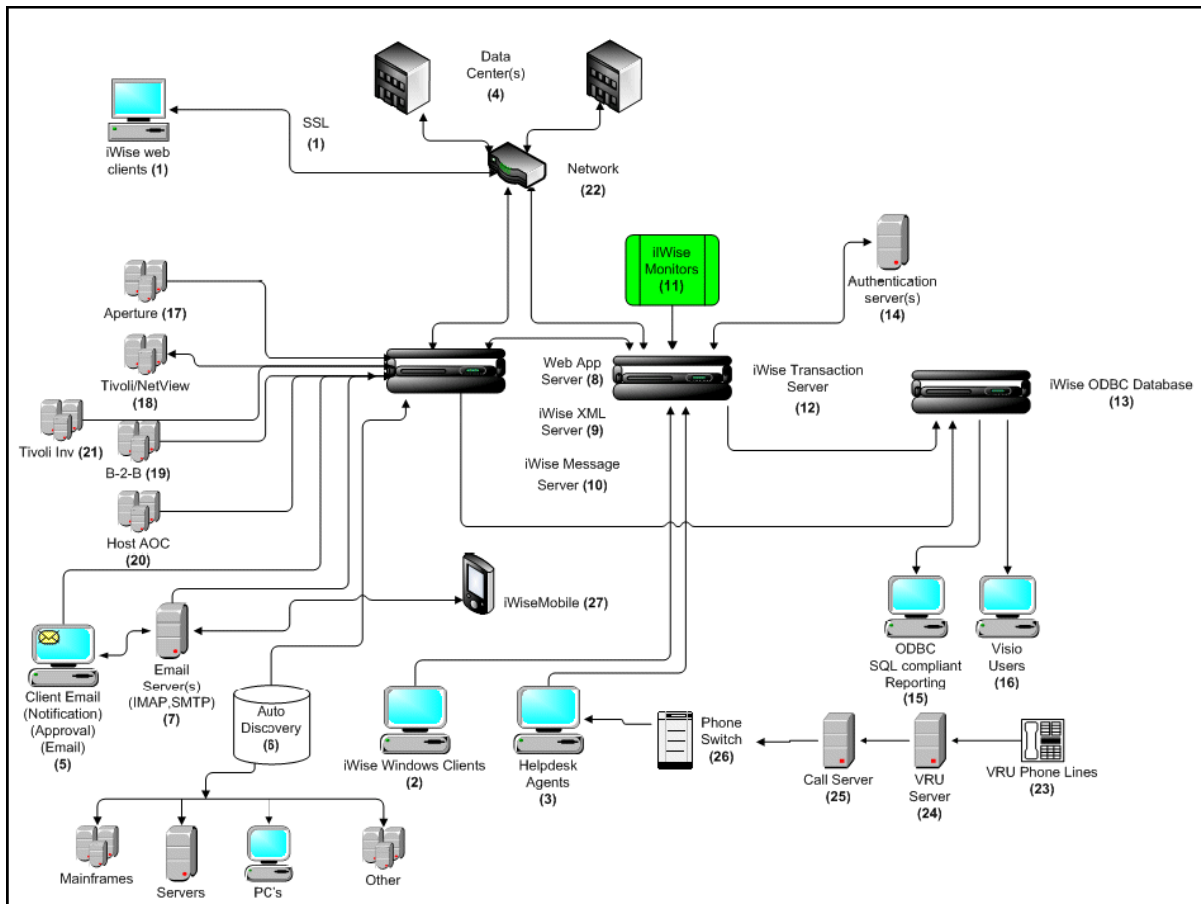
For all of the following requirements, please refer to [http://www.infrawise.com/prd\\_rqmnts.php](http://www.infrawise.com/prd_rqmnts.php)

- [Hardware Requirements for the Transaction Server](#)
- [Software Requirements for the Transaction Server](#)
- [Hardware Requirements for the Client](#)
- [Software Requirements for the Client](#)
- [Software Requirements for the Web Client](#)
- [Hardware Requirements for the iWise XML Server](#)
- [Software Requirements for the iWise XML Server](#)
- [Hardware Requirements for the Web Application Server](#)
- [Software Requirements for the Web Application Server](#)
- [Requirements for iWise Help](#)
- [Requirements for Reports](#)
- [Database Requirements](#)

## Appendix B - iWise Architecture

The following diagram and associated description illustrate the robustness of the iWise Enterprise Solutions' multi-platform architecture. Consisting of a suite of ITIL-compliant disciplines, the iWise solutions offer organizations a unique, life-cycle approach to IT Service Management. The infraWise methodology focuses on automating and streamlining service and support processes to improve efficiency and reduce costs.

Throughout the world, organizations large and small use the iWise applications and centralized repository to address ITSM Service Support and Service Delivery requirements. The intent of the diagram and descriptions below is to demonstrate the scalability, openness, and security features inherent in the iWise data model, and to point out the user-friendly interface options, flexible reporting capabilities, and ease of integration with third-party solutions that iWise offers.



Please refer to this PDF link for an explanation and description of each numbered item in the architecture - [http://www.infrawise.com/download/iWise\\_EMS\\_Architecture\\_Overview.pdf](http://www.infrawise.com/download/iWise_EMS_Architecture_Overview.pdf).

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## Appendix C – Application Worksheet

Application Name: \_\_\_\_\_

Application Function: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

System ID: \_\_\_\_\_

Session name: \_\_\_\_\_ Panel dataset name: \_\_\_\_\_

Number of concurrent users: \_\_\_\_\_

Record create function? **Y / N** : Record types: \_\_\_\_\_

Contact person: \_\_\_\_\_ Phone: \_\_\_\_\_

Validated Attributes:

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



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## Appendix D – Interface Worksheet

Interface Name: \_\_\_\_\_

Interface Function: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Is the source code available? **Y / N** If yes, source location: \_\_\_\_\_

Interface format or language: XML – **Y / N** , Email - **Y / N** , API - **Y / N** , Other - \_\_\_\_\_

System ID: \_\_\_\_\_

Execution frequency: \_\_\_\_\_

Execution Interval: \_\_\_\_\_

Exceptions: \_\_\_\_\_

How to restart if interface fails: \_\_\_\_\_

Message to issue when interface fails: \_\_\_\_\_

Is an Incident record generated if the interface fails? **Y / N** Model ID: \_\_\_\_\_

Contact person: \_\_\_\_\_ Phone: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



# Appendix E – Userexit Worksheet

Userexit Name: \_\_\_\_\_

Userexit Function: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

System ID: \_\_\_\_\_

Is the source code available? **Y / N** If yes, source location: \_\_\_\_\_

Equivalent iWise exit or TSU if known: \_\_\_\_\_

Message to issue when Userexit fails: \_\_\_\_\_

Is an Incident record generated if the Userexit fails? **Y / N** Model ID used: \_\_\_\_\_

Contact person: \_\_\_\_\_ Phone: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



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## Appendix F – TSX Worksheet

TSX Name: \_\_\_\_\_

TSX Function: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Is the source code available? **Y / N** If yes, source location: \_\_\_\_\_

Execution frequency: \_\_\_\_\_

Execution Interval: \_\_\_\_\_

System ID: \_\_\_\_\_

Exceptions: \_\_\_\_\_

How to restart if TSX fails: \_\_\_\_\_

Message to issue when TSX fails: \_\_\_\_\_

Is an Incident record generated if the TSX fails? **Y / N** Model ID: \_\_\_\_\_

Contact person: \_\_\_\_\_ Phone: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



# Appendix G – Report Worksheet

Report Name: \_\_\_\_\_

Report Function: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Is the source code available? **Y / N** If yes, source location: \_\_\_\_\_

Execution frequency: \_\_\_\_\_

Execution Interval: \_\_\_\_\_

Exceptions: \_\_\_\_\_

System ID: \_\_\_\_\_

How to restart if Report fails: \_\_\_\_\_

Message to issue when Report fails: \_\_\_\_\_

Is an Incident record generated if the Report fails? **Y / N** Model ID: \_\_\_\_\_

Contact person: \_\_\_\_\_ Phone: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## Appendix H – Staffing Requirements

Skill Set	Name(s)
InfoMan PMF skills for possible GUI modifications to your existing applications	
Windows Server network administrator	
Database Administrator for your choice of any SQL ODBC-supported database	
z/OS Systems Programmer for knowledge of current InfoMan system	
Application development (logic flows, panel design, human factors, etc.) for any required application modifications	
System and application testers	
Reports Analyst - Crystal Reports (or any other SQL reporting tool)	
REXX coding (for the iWise Monitors)	
Java Script coding (just basic skills required)	
HTML coding (just basic skills required)	
Client/Server hardware support	
Application Administrator	
iWise system Administrator	
Operations Analyst for interface(s) knowledge	

