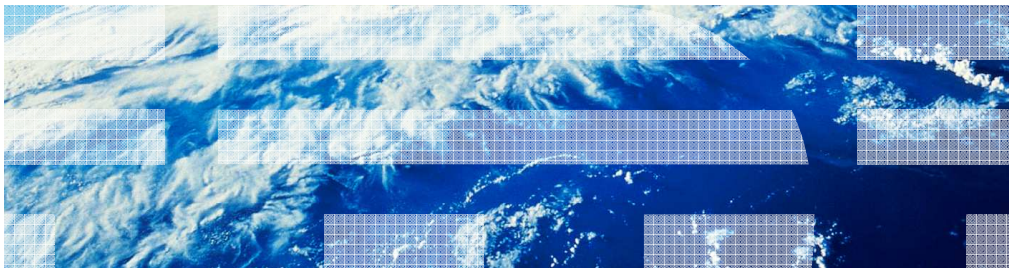




Business Process Management

IBM Business Process Manager V7.5

Migration from Lombardi Teamworks and WebSphere Lombardi Edition



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This presentation provides information about migrating from Teamworks V6.1 or higher and WebSphere® Lombardi® Edition V7.0 or higher to IBM Business Process Manager V7.5.

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- Upgrade Source Versions versus Target Versions
- Improvements in IBM BPM V7.5
- Upgrade Patterns
- Migration Methodology and Best Practices
- Summary

This presentation will first identify the different source versions that are supported for migration and the versions they target. Next this presentation will cover some of the enhancements in IBM Business Process Manager V7.5 release pertaining to migration from Teamworks and WebSphere Lombardi Edition. Finally you will gain understanding of the upgrade patterns and the recommended migration methodology and best practices associated with each. At the end of these slides you should have high level understanding of how to migrate your solutions from Teamworks V6.1 or higher and WebSphere Lombardi Edition V7.0 or higher to IBM Business Process Manager V7.5.

Migration source versions, target editions

Source version		Target version IBM BPM V7.5	
WebSphere Lombardi Edition	7.2.0	  Advanced	<p>Editions</p> <p><i>Different configurations match typical entry points or stages in a company's BPM program</i></p> <p>Transformation</p> <p><i>Complete set of advanced BPM capabilities</i></p> <ul style="list-style-type: none"> Extended support for high-volume process automation, with high quality-of-service Built-in SOA components for extensive enterprise-wide service integration, orchestration <p>Program</p> <p><i>Configured for typical BPM projects</i></p> <ul style="list-style-type: none"> For multi-project improvement programs, with high business involvement Basic system integration support Rapid time-to-value: improved user productivity <p>Project</p> <p><i>Configured for first BPM project</i></p> <ul style="list-style-type: none"> For small number of users – single server, no clustering Low entry price Install in a few clicks
	7.1.0		
Lombardi Teamworks	7.0.1	  Standard	
	7.0.0		
	6.2.2	  Express	
	6.2.1		
	6.2.0		
6.1.0			

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Architectural Overview

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Migrating refers to the process of moving applications and configuration information from an older version of a product to a later version of the product or from one product to a different product. IBM Business Process Manager V7.5 supports migration from Lombardi Teamworks® versions 6.1.0 to 7.0.1 and WebSphere Lombardi Edition V7.1.0 and V7.2.0 as shown on the left column on this slide under source version. These source versions can be migrated to IBM Business Process Manager V7.5 Advanced configuration or Standard configuration. IBM Business Process Manager V7.5 Express® configuration does not support migration. If you are using a Teamworks version predating V6.1.0 then you will first need to migrate to at least V6.1.0.

Agenda

- Migration Source Versions versus Target Versions
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Next you will learn about improvements and new capabilities introduced in IBM Business Process Manager V7.5 with regards to migration.

Migration support Business Process Manager V7.5

- V7.0→V7.5
 - Migration methodology similar to V7.01 -> V7.1 /V7.2 with addition of configuration for advanced
- V6.1 → V7.5
 - Prepare for their upgrade project : new documentation with description of upgrade phases, steps, time frames.
 - Upgrade analysis : identify model discrepancies and customizations before upgrade
 - Multiple improvements to make the execution of the upgrade as seamless as possible, including:
 - Reduce number of manual steps
 - Provide detailed information about progress and checkpoints

From a migration perspective significant effort has been made to streamline the migration process. The migration methodology for upgrading from version 7.0 to version 7.5 is similar to migrating from V7.01 or V7.1 to V7.2 with the addition of configuration for Business Process Manager Advanced. The migration support for upgrading from version 6.1 to version 7.5 has been added in this release. This includes new documentation with a description of the upgrade phases, steps, time frames and tools to analyze current environments in order to assess the effort needed to do the upgrade. The motivation has been to make the execution of the upgrade as seamless as possible, including reducing the number of manual steps, providing detailed information about progress and checkpoints.

Agenda

- Migration Source Versions versus Target Versions
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- Summary

Next you will learn about some of the identified common upgrade patterns that will help you determine which steps to follow based on your particular need.

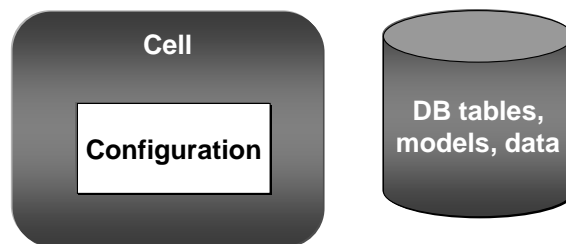
Upgrade Patterns

1. Focus on models
2. Focus on models and runtime data

Note: All of these patterns include an installation of IBM BPM V7.5, and you must perform a custom installation when upgrading. Only the custom installation option includes the upgrade utilities that you need

For each pattern, take note of:

- a. product binaries*
- b. configuration*
- c. database tables*
- d. process models*
- e. runtime data*



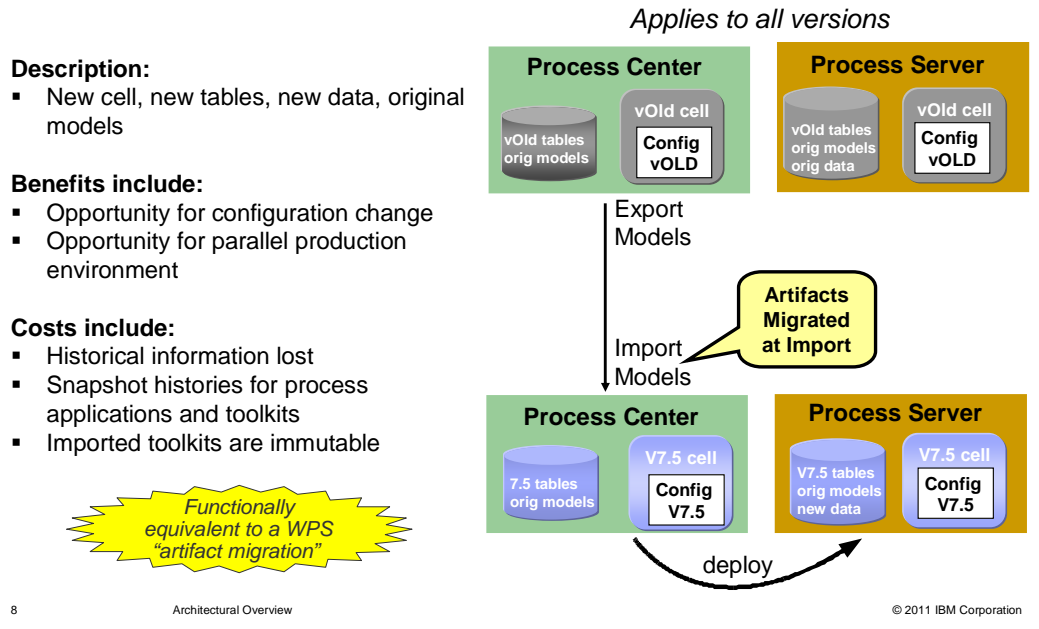
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Architectural Overview

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This chart provides an overview of the upgrade patterns identified for migration to Business Process Manager V7.5. These patterns fall into two categories. This first focuses on artifacts or model only migration. This should be followed if you are interested in upgrading only the business processes and associated assets but not any run time data. The second focuses on migrating both project assets and the run time data including in flight transactions. The next few slides provide details around these patterns, high level overview of the steps involved and some of the cons and benefits for each pattern. One important note here is that the tools and features detailed are installed only as part of custom installation. If you have done a typical install the tools like Upgrade Readiness tool are not deployed.

Pattern 1 : Focus on Models Only Process Center applications (Export / Import)



The first pattern as mentioned in the previous chart focuses on models and artifacts only. It is functionally equivalent to a WebSphere Process Server artifact migration and applies to all previous versions. To implement this pattern first analyze your current environment to identify assets that need to be upgraded. Make special note of any customizations done, for example custom code in coaches. If you are migrating from V6.1, it is recommended to run the Upgrade Readiness Check tool and closely review the report. The next step is to export the process models from old version of process center and import these assets into version 7.5. After deploying the assets re-factor the projects and code as detailed in the analysis step. You should also apply all of the customizations at this point. Next test the process flows to ensure they are executing exactly as needed. After the tests are successful you can deploy the process flows from the Process Center to the run time Process Server environments. The benefits of this pattern are that it gives you an opportunity for configuration changes. Also you can run the two environments in parallel to ensure stability of the migration. The costs that you need to be aware of is that the historical transaction data is lost as it is not migrated. This includes snapshot histories for process applications and toolkits. Also the imported toolkits are immutable.

Pattern 2a : Focus on models and runtime data
Process Center/ Process Server Application/ Instances (in place)

Applies to TW V7.0.X,WLE V7.0 → V7.5

Description:

- New cell, original (upgraded) tables, original data, original models

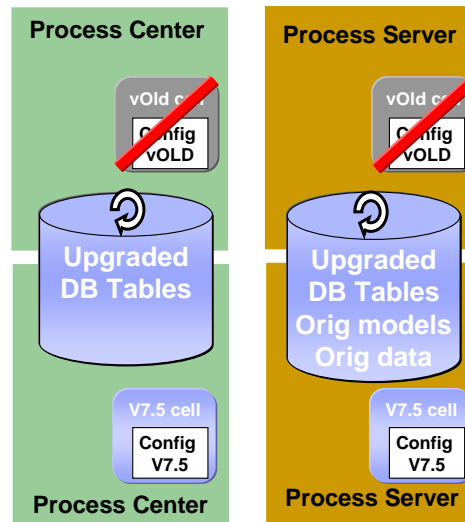
Benefits include:

- Opportunity for configuration change
- Existing application data used

Costs include:

- Some downtime is unavoidable

Functionally similar to a WPS migration (Pattern 2)



The second pattern focuses on both models and runtime data including in flight transactions. This pattern applies to only migration from Teamworks V7.0 and WebSphere Lombardi edition V7.0. To implement this pattern first backup your V7.0 artifacts and databases. The next step is to install version V7.5 BPM product binaries with the database configuration pointing to existing V7.0 databases. Apply any customization to the V7.5 environment as needed. Next, use the upgrade utility to upgrade the old databases using scripts to V7.5. This pattern is functionally similar to a WebSphere Process Server migration. For more detailed information refer to the product information center.

The benefits of this pattern are that it gives you an opportunity for configuration change and supporting existing data and transaction that might be in flight. The only real cost is some down time which is unavoidable.

Pattern 2b : Focus on models and runtime data Process Center/Process Server Application and Instances (Export/Import)

Description:

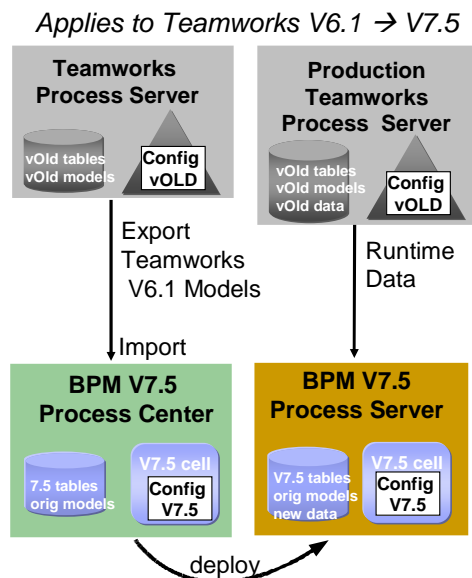
- New cell, new tables, original data, original models

Benefits include:

- Opportunity for configuration change
- Existing application data used

Costs include:

- Some downtime is unavoidable



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Architectural Overview

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The last pattern focuses on both models and runtime data including in flight transactions. This pattern applies only to migration from Teamworks V6.1. To implement this pattern first analyze your current environment to identify assets that need to be upgraded. Make a special note of any customizations done, for example custom code in coaches. It is strongly recommended to run the Upgrade Readiness Check tool and closely review the report. Based on the report you will get tasks that either need to be done before exporting artifacts from the current version or after importing them into BPM V7.5. It is recommended to list down all these tasks along with any customizations. The next step is to export the process models from the old version. It is recommended at this point to create backups of all assets and databases. Next, import the old assets into version 7.5 and then re-factor the projects and code as detailed in the analysis step. You should also apply all the customizations at this point. Next, test each process application by running it from the beginning to end on the Process Center Server to ensure that all processes and services actually work. Ensure no issues have been introduced during this refactoring process. After tests are successful migrate the runtime data using the migration tools provided. For more information refer to the information center under IBM Business Process Manager, Version 7.5 > Migrating from earlier products and versions > Migrating from Teamworks 6 > Upgrading from Teamworks 6 to IBM BPM V7.5.

The benefits of this pattern are that it gives you an opportunity for configuration change and supporting existing data and transaction that might be in flight. The only real cost which is some down time is unavoidable.

Agenda

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- Improvements in IBM BPM V7.5
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- Summary

Next you will learn about migration methodology and best practices.

Migration Methodology

- ▶ These slides specifically focus on migration from Teamworks V6.1
- ▶ Migration Average Timelines
 - ▶ These will differ depending upon complexity of migration



The next set of slides will focus on some of the best practices and methodologies that can be applied in your upgrade to version 7.5. These steps are more focused on upgrading from Teamworks V6.1 to IBM BPM version 7.5. For any migration effort; teams distribute their work into analysis, planning, development upgrade, and runtime upgrade phases. The diagram below gives an average time line for completion of each phase, however this can increase and decrease based on complexity of the migration.

Best Practices



- Do not skip or forget any pre migration step
- Prepare for IBM BPM V7.5 Upgrade
- Get familiar with IBM BPM V7.5 Standard or Advanced Edition
- Review existing environment and assets that need to be migrated
- Minimize new customizations
- Determine data archival strategy

The first recommended phase is called pre-prep. This phase is focused on getting ready and preparing for the migration to version 7.5. The essential steps in the phase are to get familiar with IBM BPM V7.5 Standard or Advanced Edition, to review existing environment and assets that need to be migrated, to minimize new customizations and to determine data archival strategy. This phase is key to really help you understand the scope of the migration, better understand version 7.5, trim assets that are no longer needed and assess how you want to handle your data.

Best Practices

Pre-Prep

Analysis

Planning

Dev

Runtime

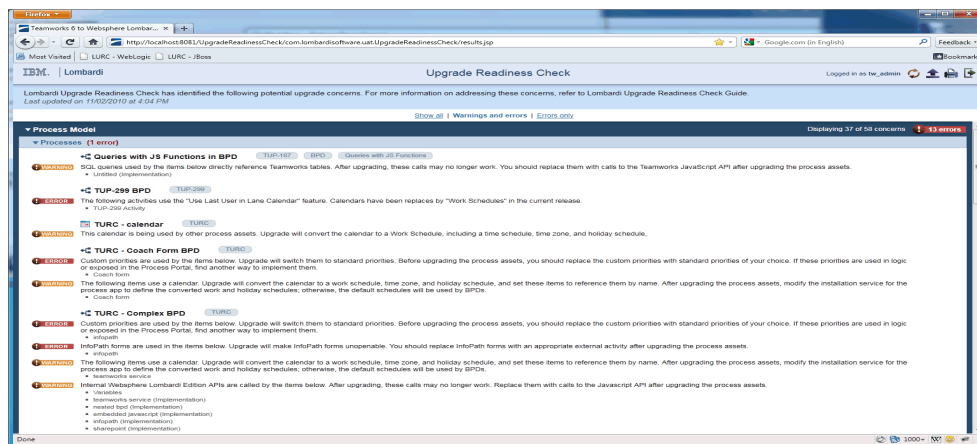
- Prepare for IBM BPM V7.5 migration including backing up your existing environment
- Run the Upgrades Readiness Tool
- Analyze Report and identify potential issues
- Distribute issues into two list – pre migration and post migration
- Fix and test pre migration issues that can be addressed in Teamworks.
- Repeat these steps until you find no more issues or until all remaining issues are to be resolved in the Development Upgrade phase.
- Note important files and configuration changes

The next phase is called the analysis phase which can take several days to several weeks. It is recommended for version V6.1 migration to start this phase by executing the Upgrade Readiness Check tool. This tool helps identify potential migration issues with your Teamworks V6.1 process assets relative to IBM Business Process Manager. These include deprecated features and api's and customizations. The report generated, as shown in the next slide will identify task items that need to be addressed either in Teamworks V6.1 itself or after importing them into V7.5. Fix and thoroughly test the issues that can be addressed in Teamworks V6.1. Repeat these steps until you find no more issues or until all remaining issues are to be resolved in the development upgrade phase. The term, process assets, refers to all items created in Teamworks to define, implement, and analyze your processes, such as Business Process Definitions, Coaches, services, participant groups, and reports.

Best Practices



Upgrade Readiness Tool V7.5



Upgrade Readiness Check is a tool that identifies business process assets that can cause issues when you upgrade from Lombardi Teamworks version 6.1.0, 6.2.0, 6.2.1, or 6.2.2 to IBM Business Process Manager V7.5.

The Upgrade Readiness Check tool is included in IBM Business Process Manager V7.5.

You must do a custom install to get this tool.

Best Practices



- Run concurrently with Analysis phase
- Understand the upgrade life cycle
- Determine resource and hardware needs
- Plan project timelines
- Backup of existing assets and data
- Best practices and typical problems
- Includes checklists and worksheets

The next phase is the planning phase which can also take from several days to weeks depending upon complexity of the migration. It can be run concurrently with the analysis phase. Activities in this phase related to Teamworks side are implementing changes to Teamworks V6.1 assets and backup of existing project assets and data. The activities related to IBM Business Process Manager V7.5 include determining the hardware and software requirements, planning and defining timelines for installation, migration of project assets and related data and testing the upgrades. You should create documentation and tasks checklist for the upgrade process, timelines and methodologies to ensure all involved parties are level set and no step is over looked.

Best Practices

Pre-Prep

Analysis

Planning

Dev

Runtime

Note: Uninstall the hot fix 10 from Teamworks Release V6.2 SP2 (V6.2.2) installation, if applicable

- Backup existing environment, project assets and data
- Install BPM V7.5 Process Centre and import / upgrade assets based on the pattern identified for migration
- Fix any issues you encounter and test fixes before progressing forward
- Through testing prepares environment for production migration
 - Ensure test coverage for all assets /artifacts, runtimes, process flows
 - Test using production like data
 - Test error recovery and disaster scenarios

Now that migration has been analyzed and planned, the next step is the actual execution. This falls into two phases which are: development phase and runtime phase. If you have applied hot fix 10 to Teamworks Release 6.2 SP2 (6.2.2) installation, you need to first uninstall it. In the development phase you will first backup your existing environment, project assets and data. Next, install IBM Process Center and import your process assets. You will then process to fix any issues you encounter including those determined by upgrade readiness tool and test the fixes. Thorough testing prepares environment for production migration. It ensures test coverage for all assets/artifacts, runtimes, process flows verifying stability and production readiness of the upgraded project assets. It is also strongly recommended to test the error recovery and disaster scenarios.

Best Practices

Pre-Prep

Analysis

Planning

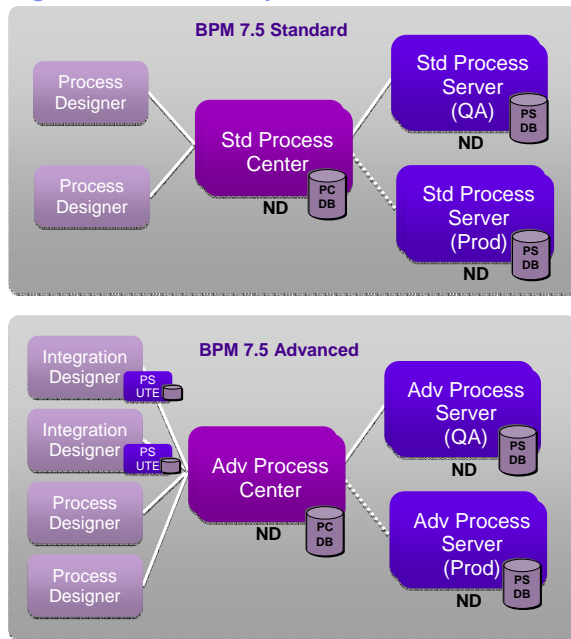
Dev

Runtime

- ▶ Repeat for each run time environment
- ▶ Plan to upgrade and test a copy of the production data before upgrading the production environment itself.
- ▶ Install BPM V7.5 Process Server for each runtime environment
- ▶ Migrate all runtime data first
- ▶ Test and fix processes in the new environment
- ▶ Decommission the Teamworks V6.1 environment

The final phase is the runtime upgrade phase. In this phase, for each runtime environment, install IBM Process Server, migrate all runtime data, test the execution of the projects and fix any issues as detected. The last step after verifying the new upgrade environment and running it in production for an agreed upon time is to decommission the Teamworks V6.1 environment.

Migration Summary



Migration Sources

WebSphere Lombardi Edition 720x
 WebSphere Lombardi Edition 710x
 Lombardi Teamworks 70x
 Lombardi Teamworks 62x
 Lombardi Teamworks 61x

Migration Targets

BPM 7.5 Standard (entitlement)
 BPM 7.5 Advanced

Migration Methods

Teamworks 70x,
 WebSphere Lombardi Edition 710x
 and 720x

- Process Center/Process Server Application/Instance (In Place)
- Process Center Application (Export/Import)

Teamworks 61x/62x

- Process Center/Process Server Application + Instance (Export/Import)
- Process Center Application (Export/Import)



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