

Migration Manager

Tivoli_® software







Agenda

- Introduction
- Architecture
- Migration tasks
- What's new in Maximo 7.5 Migration Manager
- Migration Collections
- Usability improvements
- Logging and Troubleshooting
- Resources





What is Migration Manager?

- Vision and scope: Configuration migration between Maximo environments at same release level
 - Pre-production to production
- Support standard rollout environments
 - DEV->TEST->PRODUCTION
- Purpose:
 - Seed a new product environment with all the configurations created for a particular client production rollout
 - Periodically promote configurations implemented after initial rollout
- First released with Maximo 7.1.0





Benefits

- Lower implementation costs
 - Standardized process to promote product configurations
 - Reuse of existing Maximo technology
 - No separate tools or utilities
 - Automation of many manual tasks
- Adhere to IT policies and regulations
 - Adapt the migration to implementation-specific needs
 - Plan for and control migration tasks
 - Track and report on migration tasks

Security

Workflow

Reports

Screen Designer

Database Configuration



Configuration Applications

Maximo rollout involves more configuration than ever before



More user acceptance testing

- Application Designer
- Domains
- Sets
- Cron Tasks
- Communication Templates
- Escalations
- Enhanced Security
- Enhanced Workflow
- Database Configuration
- Enhanced Reports

- Enterprise Services
- Channels
- Logging
- System Properties
- Condition Expressions
- Application Designer
- Domains
- Sets
- Cron Tasks
- Communication Templates
- Escalations
- Enhanced Security
- Enhanced Workflow
- Enhanced Integration
- Database Configuration
- Enhanced Reports

Maximo 5.2 Maximo 6.2.1 Maximo 7.x

Configuration applications in Maximo



Supported Base Services configurations

■ In 7.x release, migration focus is on:

System Configuration

Security

Integration

Reporting

Queries *

Start Center Templates

System Properties

Logging

Domains

Database Configuration

Application Designer

Communication Templates

Actions

Roles

Escalations

Workflow Designer

Cron Task Setup

E-mail Listeners

Object Structures

Automation Scripts *

Security Groups

Users

Launch in Context

Publish Channels

Invocation Channels

Enterprise Services

End Points

Web Service Interactions *

Web Services Library *

External Systems

Sets

Organizations

Calendars

People

Person Groups

Conditional Expression Manager

KPI Manager

Report Administration

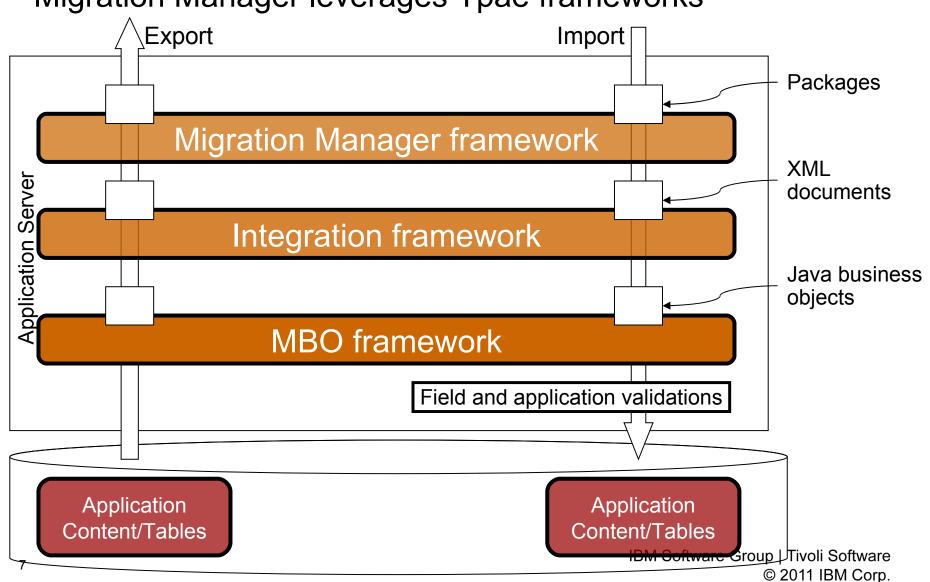
^{*} Added in Maximo 7.5





Architecture

Migration Manager leverages Tpae frameworks







Migrating product configurations

- Product configurations are treated as content
- Two types of content:
 - Content in database
 - Content outside database
- Content in database
 - Typically tables and records in the Maximo schema
 - Maximo encapsulation of a table: Maximo Business Object (MBO)
- Content outside database
 - Typically files on file system
 - Must be built into an Enterprise Archive (EAR) and deployed into application server





Organizing Database Content – Object Structures and Migration Groups

Maximo tables/MBOs **Object Structure** Migration group WFPROCESS **WFNODE WFTASK** WFASSIGNMENT WFSTART **WFSTOP WFINPUT Process WFACTION** WFINTERACTION Workflow **WFWAITLIST** WFCONDITION Comm Templates WFNOTIFICATION **WFSUBPROCESS COMMTEMPLATE** System **COMMTMPLTSENDTO** Roles COMMTEMPLTDOCS **Application MAXROLE** Actions **Data Dictionary ACTION ACTIONGROUP Dependent Groups**





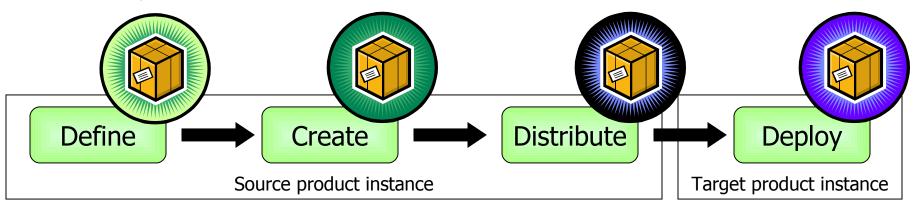
Organizing Content outside the database

- Files that must be part of Maximo EAR
 - Deployed into the application server
 - · .class, .jar, .properties, .xml
- Called 'compiled sources'
- Multiple 'compiled source' files can be consolidated into ZIP file for migration



Content migrated in packages

- Package
 - Package is a container for product configuration content
- Package has a life-cycle; package is:
 - Defined
 - Created
 - Distributed
 - Deployed







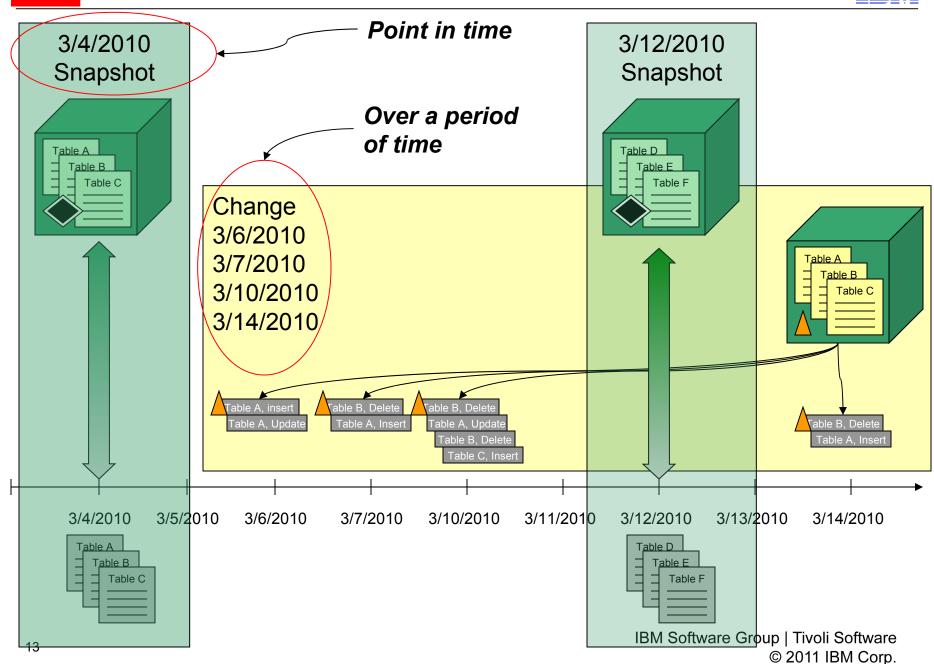
Types of packages

Snapshot

- "As is" configuration information collected for a package on demand
- Package defined after the fact

Change

- Configuration information collected over a period of time
 - Inserts, updates and deletes occurring since package was activated
- Configuration records created, modified, or deleted by designated users
- Package defined before changes occur





Package Definition

Package Creation

Package Distribution

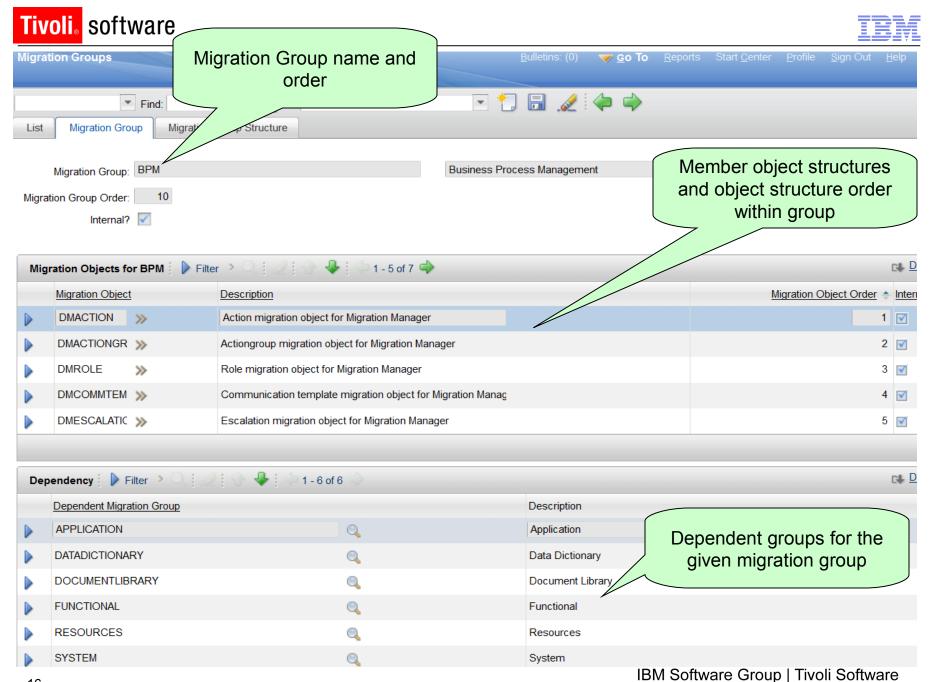
Package Deployment





Defining a package

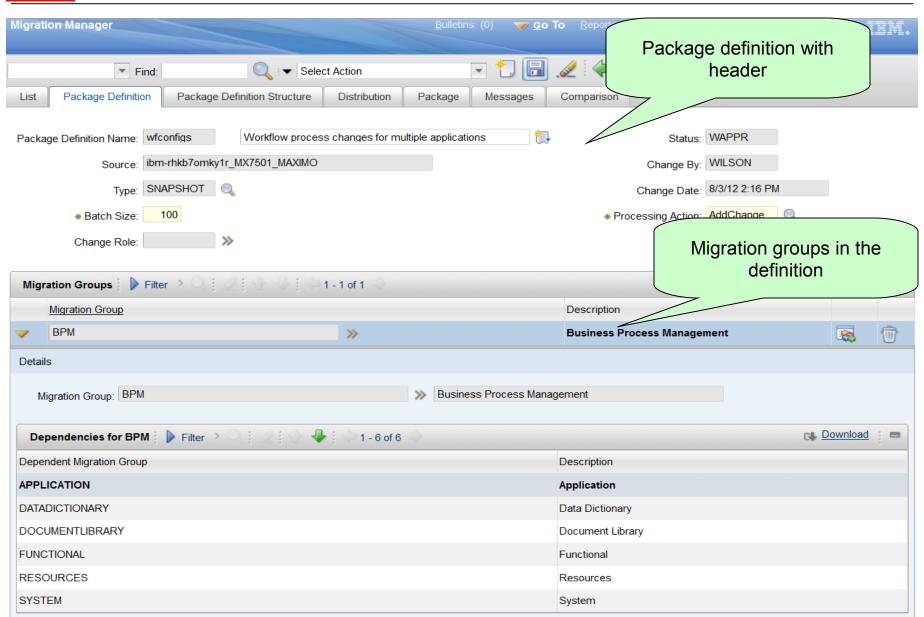
- User-driven task to identify the contents of a package in source environment
 - Specify the type of package
 - Snapshot or change
 - Specify migration groups
 - Specify compiled sources



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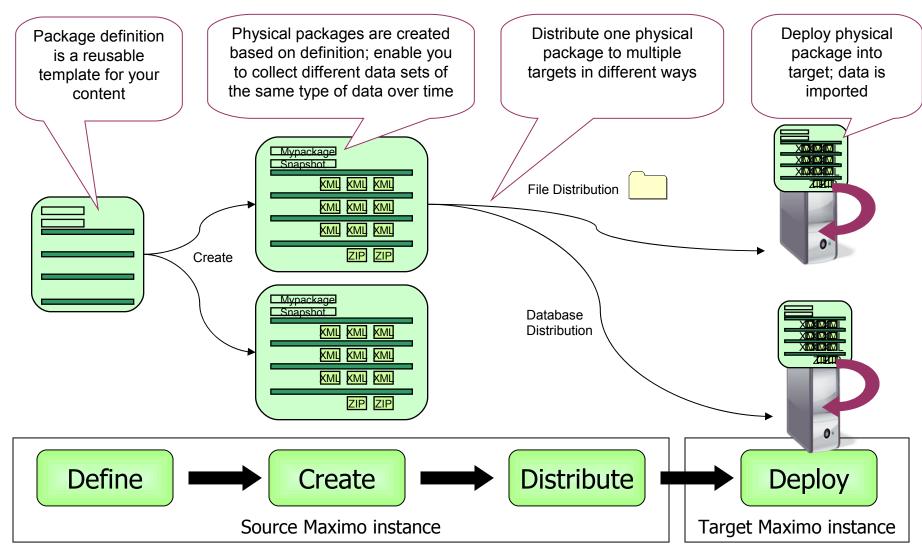








Package definition and physical packages







Package Definition

Package Creation

Package Distribution

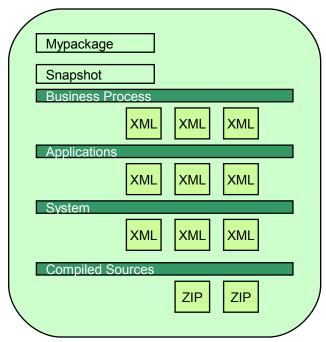
Package Deployment





Creating a package

- Package definition only defines the content
- Actual configuration data collection done during package creation
- User-driven task to collect configuration information and compiled sources based on definition
 - Long-running task depending upon amount of information to be collected
 - Package is created in the form of records in a staging table



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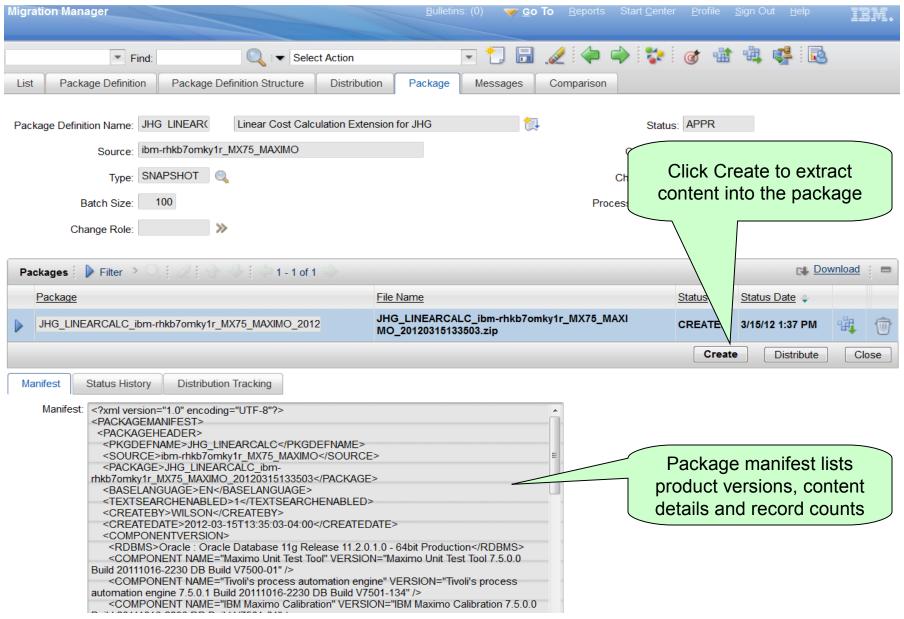


Creating a package - Manifest

- Manifest is used to determine if package can be deployed in target
 - Viewable from Migration Manager application
- Manifest contains:
 - Package information
 - Source environment version information
 - RDBMS
 - Maximo and Industry Solution versions
 - Migration objects in package and record count for each
 - Optional Readme information entered in source environment by package creator that assists in planning deployment into target









Package Definition

Package Creation

Package Distribution

Package Deployment



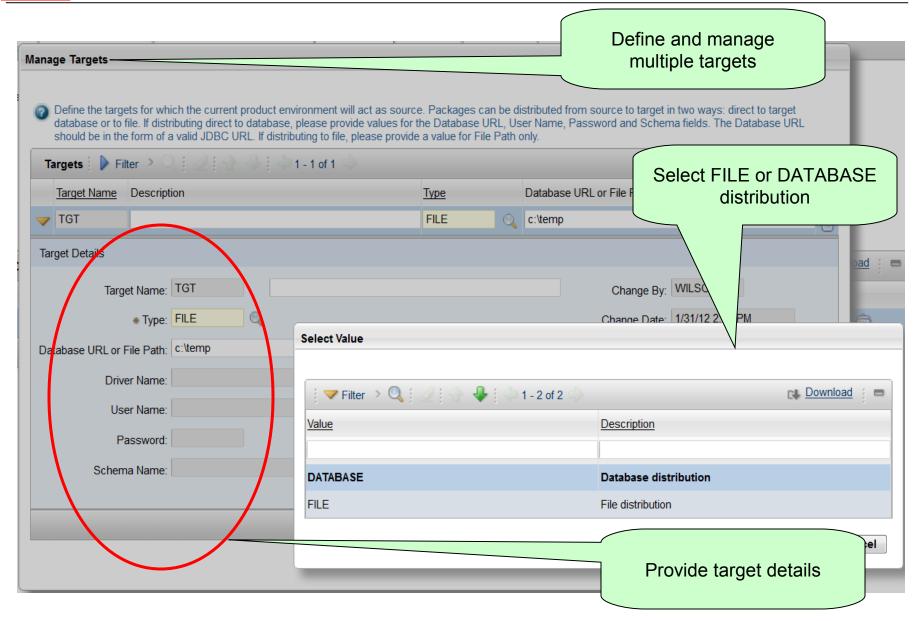


Distributing a package

- User-driven task to distribute a package to target environments
- Distribute to:
 - Database
 - Remote database in the target environment
 - File
 - Migration Manager-generated file copied to designated folder
- Distribution through Migration Manager application









Package Definition

Package Creation

Package Distribution

Package Deployment





Deploying a package

- User-driven task to process the contents of a package in a target environment
 - Process metadata associated with package
 - Process compiled sources
 - Apply structural changes to Maximo tables based on data dictionary metadata
 - Process other configuration data
- Package deployed through Migration Manager application





Deployment Paths

- Deployment steps can vary depending upon the contents of package
- Deployment steps determine if service outage will occur
 - Deployment should be scheduled to occur during maintenance windows
- No manual intervention
- No restart
- No outage

Package A

Nonstructural content only

[Example, workflow process definitions]

- Manual intervention required
- No restart
- Service Outage

Package B

Structural content only

[Example, object, attribute, indexes definitions]

Package C

Structural and non-structural content

[Example, object, attribute definitions + workflow process definitions]

- Manual intervention required
- Restart may be required
- Service outage

Package D

Compiled sources only

[Example, custom Java package and Java class files]

Package E

Compiled Sources and Non-structural content

[Example, custom Java package and Java class files + workflow process definitions]

Package F

Compiled sources and structural content

[Example, custom Java package and Java class files + object, attribute, indexes definitions]



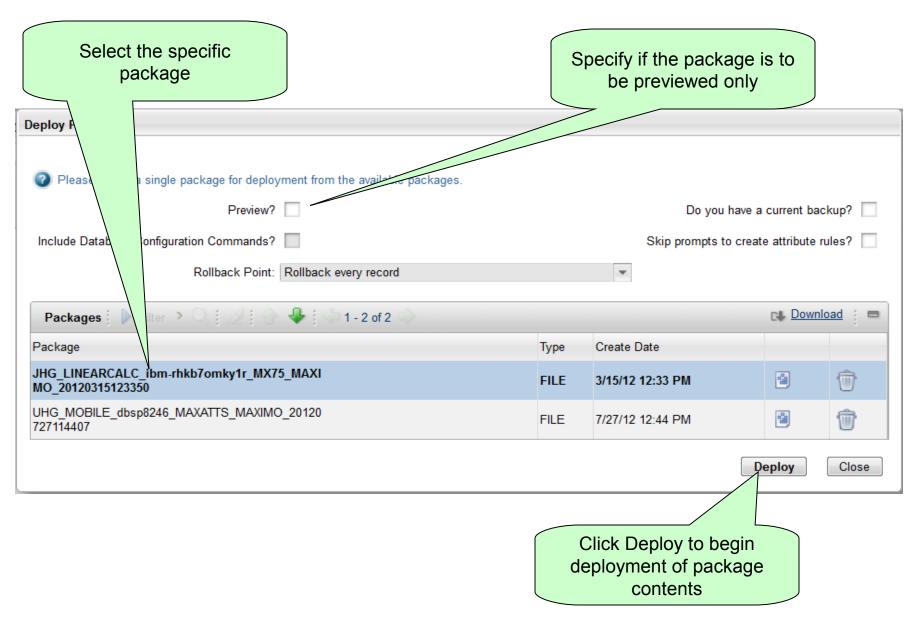


Deploying a package - Pre-requisites

- Backup the database before initiating the deployment of a package
 - Migration Manager application will warn
 - If administrator chooses to continue, a log statement will record the fact
- Only one package can be deployed at a time
 - To preserve integrity of structural changes

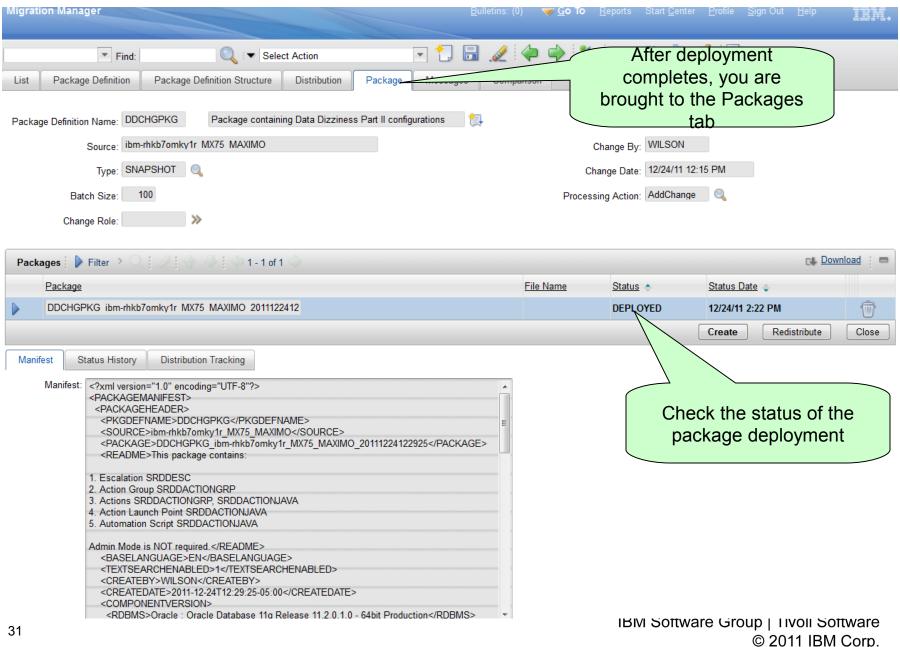
















ADMIN MODE

- New for Maximo 7.1
 - Reduces server downtime while controlling access to Maximo
- Restricted access to Maximo
 - No cron tasks
 - No end user sessions (except designated administrator logins)
 - No event listeners
- Required for:
 - Structural database configuration with configdb
 - Deployment of packages containing structural changes
 - Deployment of packages containing presentation XML
- Benefit: Ensure no changes are made while package is being created or deployed





Protecting against deployment failures

Proactive approach

- Database backups
 - Most clients already implement periodic/daily backups of production
 - Ability to restore to previous state
- Integrity Checker
 - Integrity Checker tool ships with Maximo
 - Run Integrity Checker prior to and after deployment
 - Address all errors and warnings issued by Integrity Checker

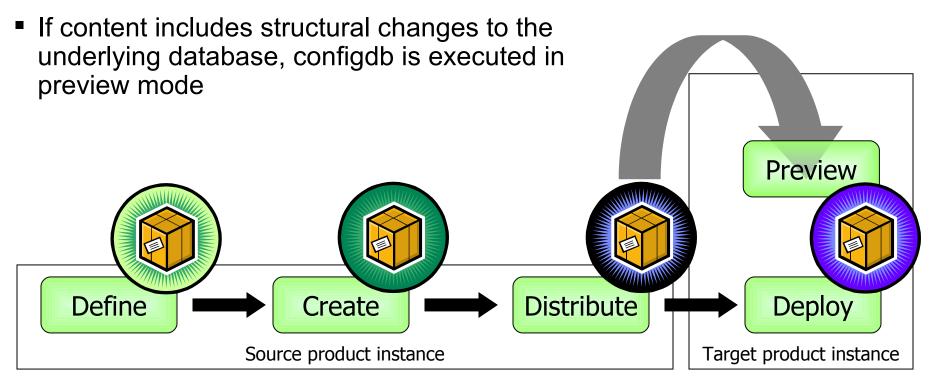
```
ERROR -- Column WFTOOLBAR.TOOLBARLOCATION is mapped to domain TOOLBARLOCATIONS, but is not defined the same Fri Mar 07 16:27:13 EST 2008
```

```
WFTOOLBAR.TOOLBARLOCATION is UPPER(10). TOOLBARLOCATIONS is ALN(10). Fri Mar 07 16:27:13 EST 200
```



Maximo 7.1.1.6 - Preview feature

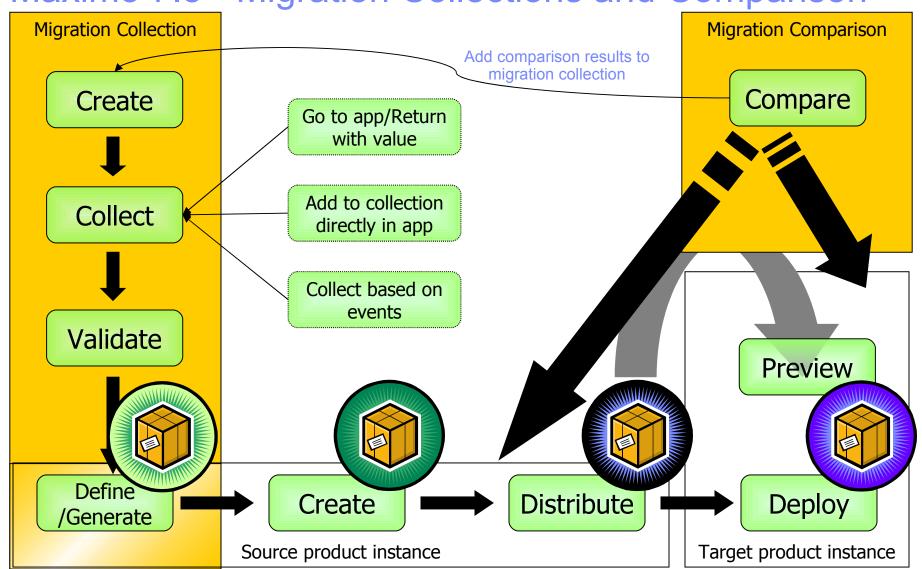
- Enables administrators or implementers to perform a dry run of content in migration packages
- Helps identify potential data validation errors ahead of full deployment
- Results of data validation are captured in a preview log file







Maximo 7.5 - Migration Collections and Comparison





Migration Manager strategy for Maximo 7.5

- Provide more user-friendly, flexible toolset
- Accelerate migrations completing production roll-outs faster
 - Reduce deployment time
- Multiple options to identify and collect system configurations
 - 'Pick and choose' approach
 - Comparison approach
- Multiple options to migrate system configurations
 - Snapshots
 - Change
 - Migration Collections
- Improve usability of the Migration Manager application
 - Fewer clicks to complete key tasks





Migration Collections

Motivation:

Too costly to maintain external spreadsheets that record configuration activities. Yet, it is a pre-requisite to better manage migration tasks.

Client feedback:

Provide a mechanism where my team can pick and choose the configurations to be migrated. Snapshot packages force my team to be deeply aware of tables, columns and SQL criteria. Change packages force my team to be extremely careful with the changes they make in development.

Solution:

- Decouple collection of configurations from migration ("Pick and choose")
- Use Tpae capabilities to collect configurations by application
- Validate the configurations for completeness, allow developers and implementers to make adjustments
- Automate the creation of package definition
- Goal: Accelerate package design





Migration Collections – Key Features

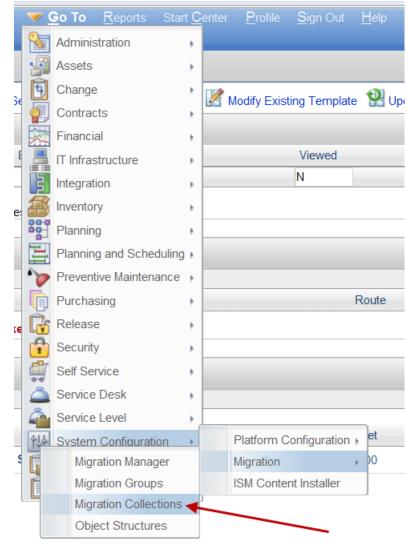
- Multiple mechanisms to identify and collect system configurations
- Validation of collected configurations for completeness
 - Trim or expand collection based on results of validation
- Define, enable or disable rules that drive validations
- Export or import collection entries with few clicks
 - Enables a implementation where system configurations must be placed in version control systems
- Generate package definitions
 - Package definition rules determine number of package definitions required





Migration Collections application

- Go To->System Configuration >Platform Configuration >Migration->Migration
 Collections
- Standard power application with four tabs
 - List
 - Migration Collection
 - Validation Results
 - Package Definitions







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Migration Collections application

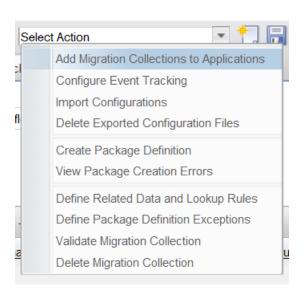
- No out of the box migration collections
- Migration collection created by implementers / developers in development environments
- Migration collection can be public (shared) or private
- Migration collections are oriented towards Migration Manager supported applications
 - Unlike traditional migration groups and object structures
- Migration collection can be populated using any combination of the following four paths:
 - Go to <Application> and return with Value (single record)
 - Enable Migration Collection toolbar button in target application and collect multiple records into chosen collection
 - Enable event-based subscription to one or more applications and automatically collect confingrations into a chosen collection
 - Import system configurations in the form of Maximo XML directly into an empty collection





Migration Collections application

- Select Action menu items grouped as:
 - Configuring data collection from applications
 - Add Migration Collections to Applications
 - · Configure Event Tracking
 - Exporting / Importing configurations
 - Import Configurations
 - Delete Exported Configuration Files
 - Package definition options
 - Create Package Definition
 - View Package Creation Errors
 - Validation options
 - Define Related Data and Lookup Rules
 - Define Package Definition Exceptions
 - Validate Migration Collection





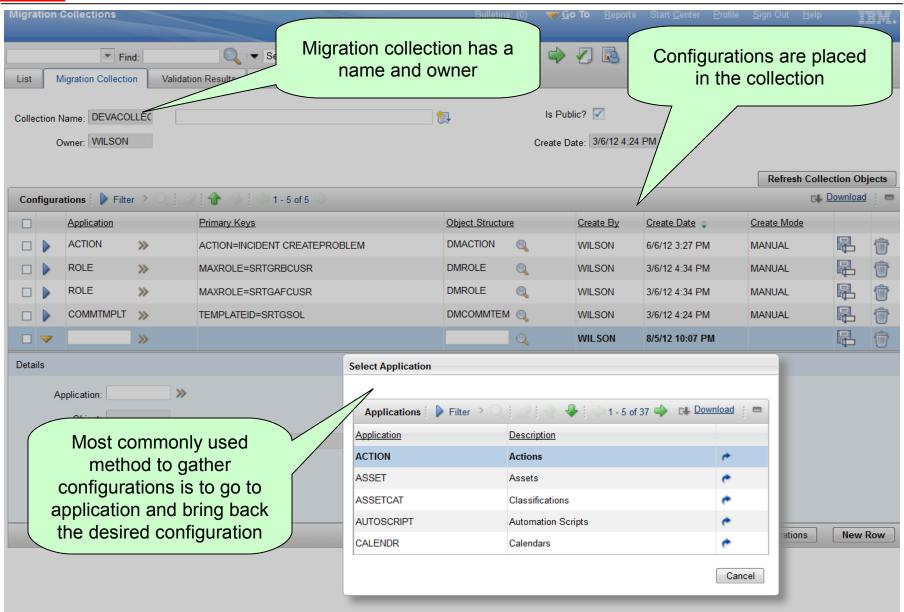


Migration Collections application – Application orientation

- Collection of configurations is oriented by application
- Candidate applications are identified dynamically based on the availability of system-defined Migration Manager object structure
- If exploiters place additional system-defined Migration Manager object structures, they will be picked up automatically thereby enabling more applications to participate in Migration Collections
- A collection entry may initially be associated with systemdefined object structure but can be switched to a userdefined object structure in the Migration Collection tab

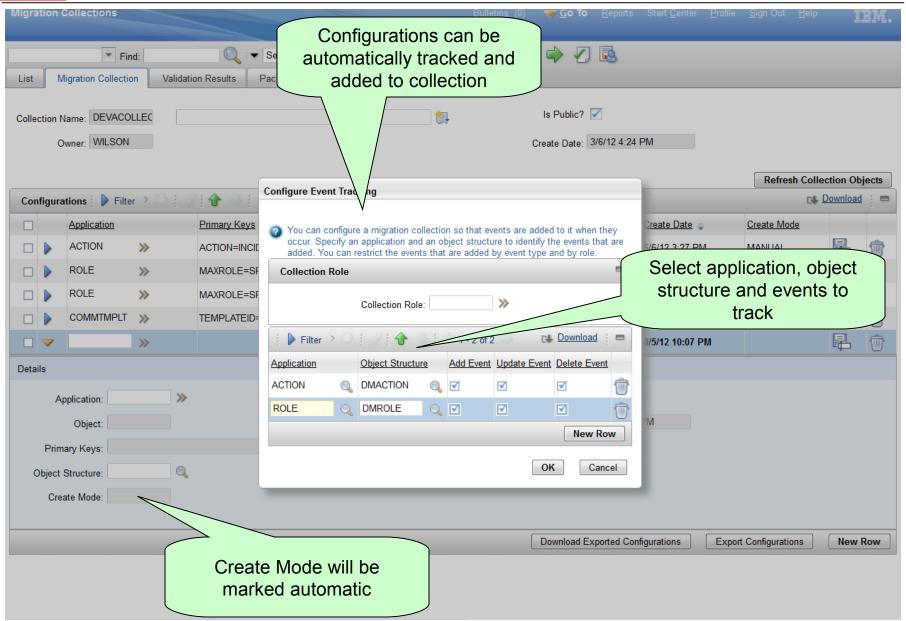














- Validation scan determines the completeness of data for the purpose of migration
- Validation scan begins with the set of entries in the migration collection
 - A migration collection may be empty under certain conditions
- Validation scan employs rule sets to determine related data
 - Data Dictionary meta-data
 - Related Data rules
 - Lookup rules
- Related Data rules identify secondary data in an application
 - Example, relationships for a business object
 - There is no independent application managing this data
- Lookup rules identify data that has no dedicated management user interface at all
 - Example, MAXVARs, Start Center Templates



- Validation scan initiated by user
 - Not mandatory, but strongly recommended
- Runs as a background task on application server
- Validation scan progress posted to client popup dialog
 - Dialog can be closed and re-opened as needed
- Long running process dependent upon:
 - Number of collection entries
 - Quantity and quality of data dictionary meta-data
 - Number of enabled related rules
 - Number of enabled lookup rules





- Three types of validation scan results are possible
 - Orphan collection entries (system configuration no longer exists)
 - Duplicate collection entries (system configuration re-created)
 - Related data not present in the collection
- Users can delete orphan and duplicate entries
- Users can review, trim related data records and add to the collection

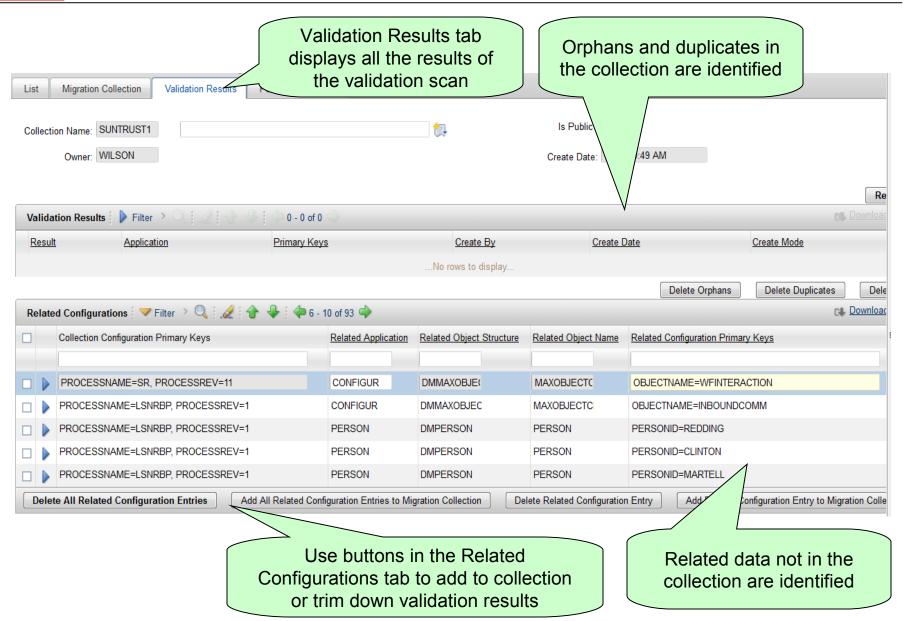




- Validation can be run as many times as needed
- Each validation run will automatically delete the current set of related data
- A validation background task cannot be terminated
 - Will either complete or error out
 - Errors may occur primarily if data dictionary meta-data is badly defined
 - Error will be reported in the popup dialog
 - Additional details can be gathered by enabling DEBUG logging
- If a migration collection is deleted, all related data found are also deleted
- If a validation background task fails, use Cron Task Setup application to review errors and delete background task
 - Execute Cron Task Admin Job Queue action to bring up background tasks
 - Look for jobs where Job Name='DMCOLLECTION'









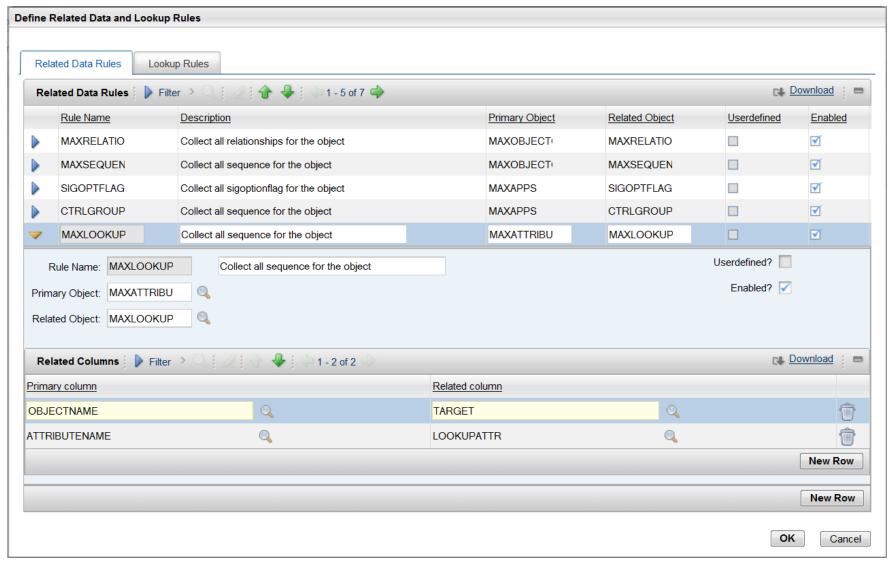
Migration Collections application - Rules

- Validation scan executes in three phases:
 - Data Dictionary meta-data
 - Related Data Rules
 - Lookup Rules
- Several Related Data Rules out of the box
 - Basis: Independent Migration Manager object structure exists, however there is no independent management application
 - Enabled out of the box
- Additional related data rules can be defined
- Individual rules can be enabled or disabled as needed
 - Disabled rule will prevent related data from being picked up





Related Data Rules user interface







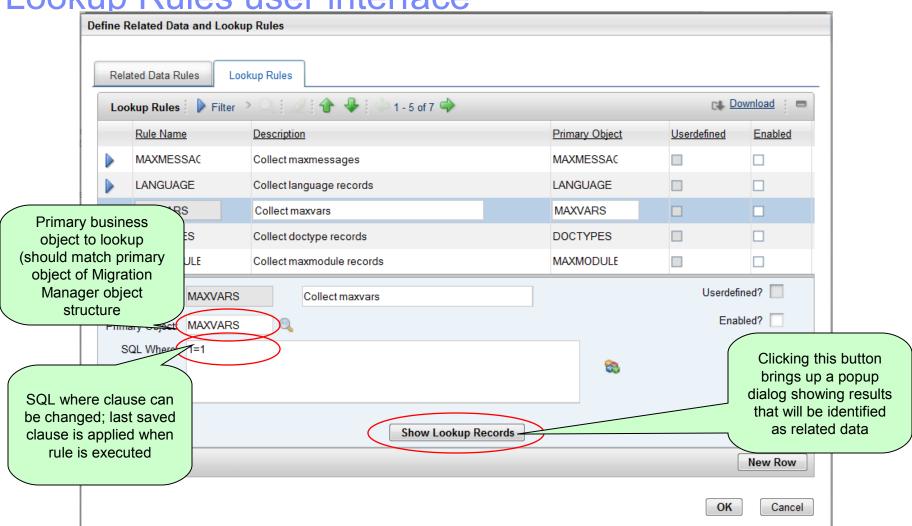
Lookup Rules

- Several Lookup Rules out of the box
 - Basis: Independent Migration Manager object structure exists, however there is no user interface for this data
 - All lookup rules disabled out of the box
 - Use only when needed
- Out of the box lookup rules are set up as SQL criteria
- SQL can be executed and results reviewed in rules user interface
 - Results are brought up in popup dialog
- If additional lookup rules need to be defined, popup dialog must be created using Application Designer
 - Popup dialog reference must be placed in Migration Collections presentation
 XML





Lookup Rules user interface







Export and import from Migration Collections

- Clients seek quick export and import of system configurations from development environments
 - System configurations are maintained in version control systems
- Migration Collections application enables export and import of different system configurations from single tab
 - XML representation only
- Not intended as generic application export-import
 - Integration Framework enables generic application-based exportimport
- Intended to offer developer-friendly mechanism for Tpae system configuration extraction



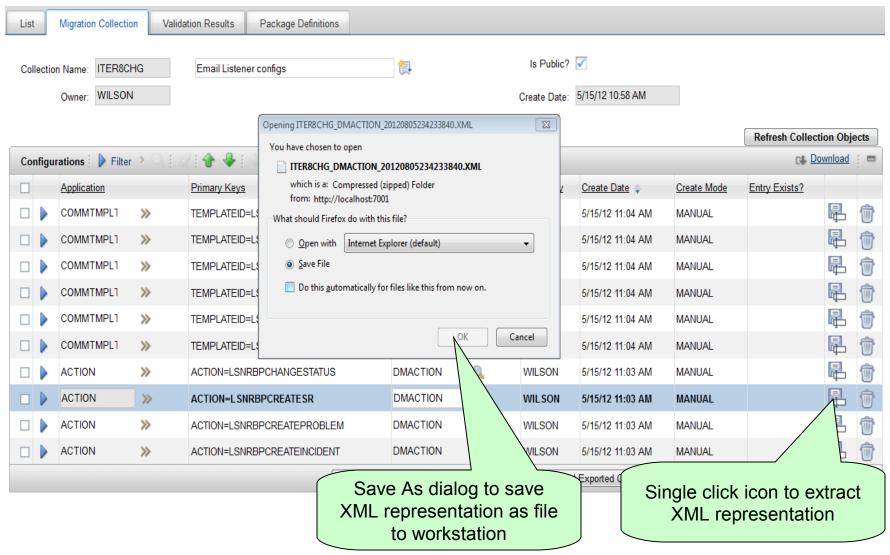


Export

- Single configuration export steps:
 - 1. Place system configuration in chosen collection
 - 2. Click the Export Configuration button
 - 3. Save As dialog is presented along with file name
 - Save As dialog behavior depends upon web browser configuration
- Multiple file export steps:
 - 1. Select multiple records in the collection
 - 2. Click the Export Configurations button
 - 3. Verify confirmation message that export was completed
 - Click the Download Exported Configurations to obtain multiple files one-byone
 - If the system configuration has been deleted but collection entry exists, export will report error BMXAA7906E











Import

- System configurations can be imported into an empty migration collection
 - Migration Collection application will import and commit system configurations
 - Imported system configurations will become members of the collection
 - If import fails error BMXAA7971E will be reported
 - There may be nested errors from the Integration Framework
 - Out of the box, the import limit is 100 records per XML
 - Option not to place imported configurations into collection





Generating package definitions

- Migration Collections application generates package definition
- Driven by:
 - Current contents of the migration collection
 - Object structures registered with individual entries in the migration collection
 - Package definition exception rules
 - Will determine if multiple packages are required to migrate the collection
- If package definition fails, the errors can be viewed in a popup dialog
 - Package definition errors may occur if data dictionary meta-data badly defined



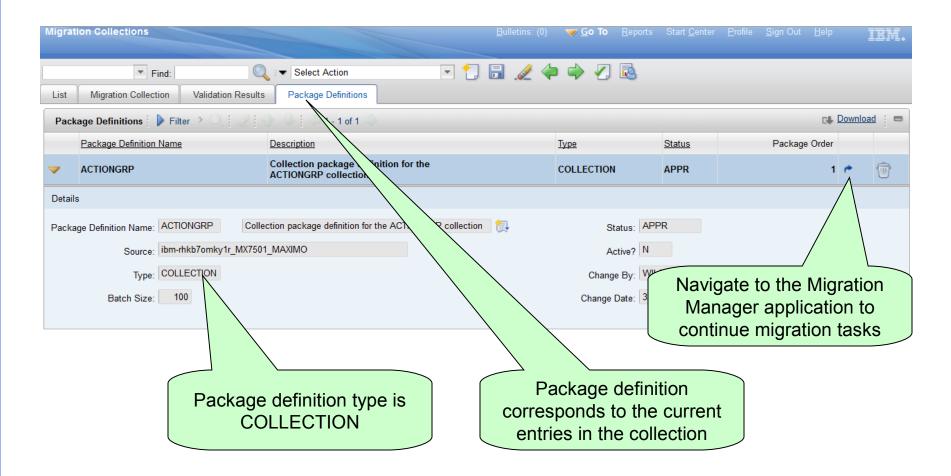


Generating package definitions

- Package definitions driven by collections are categorized as COLLECTION
- No SQL where clause can be associated
 - Downstream package migration activities driven purely by contents of migration collection
- SNAPSHOT and CHANGE package definition functionality continues to be available
- Package creation, distribution and deployment for all three types of packages exactly the same









Summary

 Migration collection is a bridge between system configuration and migration

Accelerate package design **Migration Collections** Development / Configuration Select key configurations Tool identifies related configurations Tool generates package definitions Tool sequences package definitions Tool *imports* configurations supporting source control model Tool exports configurations supporting source control model

Accelerate migration **Usability** improvements Replace values Compare Error correction bup | Tivoli Software © 2011 IBM Corp.





Usability Improvements

- Driven by client, implementer, business partner feedback
- Reduce the number of steps required to perform migrations
- Automate tasks where ever possible

Migration Area	Description
Package definition	System property 'mxe.dm.autoapprovepkgdef' can be turned on to set package definition status to APPR automatically. Set to '0' out of the box.
Package definition	Snapshot packages no longer require separate activation step
Package distribution	Distribution record automatically created once a target is chosen to distribute package to
Package deployment	eSig dialog no longer presented – signature option is present but not enabled





Value replacement

- With Maximo 7.1.x, Migration Manager did not have the capability to replace values in flight
 - Could not accommodate migration scenarios where development configurations should not be migrated as-is to production
 - Organization / Site
 - User ID references
 - Date / Time values
- With Maximo 7.5, Migration Manager enables the creation of replacement rules
 - Rules are built on top of existing Integration Framework mapping capabilities
- No out of the box value replacement rules
- Migration Manager application provides management user interface



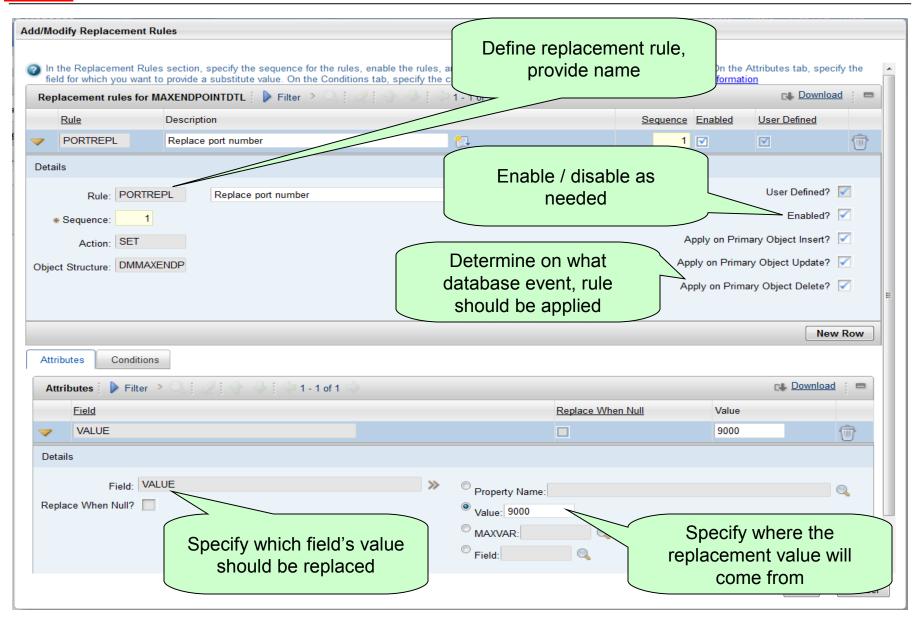


Value replacement – key features

- In source environment, implementers can flag certain attributes that require value replacement
 - During deployment, Migration Manager prompts user to define replacement rules for such attributes
- In target environment, implementers can:
 - Define value replacement for any Migration Manager object structure
 - Define value replacement for any business object and attribute combination in the object structure
 - Define conditional value replacement
- Value replacement rules are system-wide
 - Will be applied to any inbound package that contains system configuration created with an object structure that has a replacement rule
 - Will be applied to all types of packages (SNAPSHOT, CHANGE, COLLECTION)
- Replacement rules can be enabled or disabled
- Replacement rules can be applied against specific database actions (insert, update or delete)









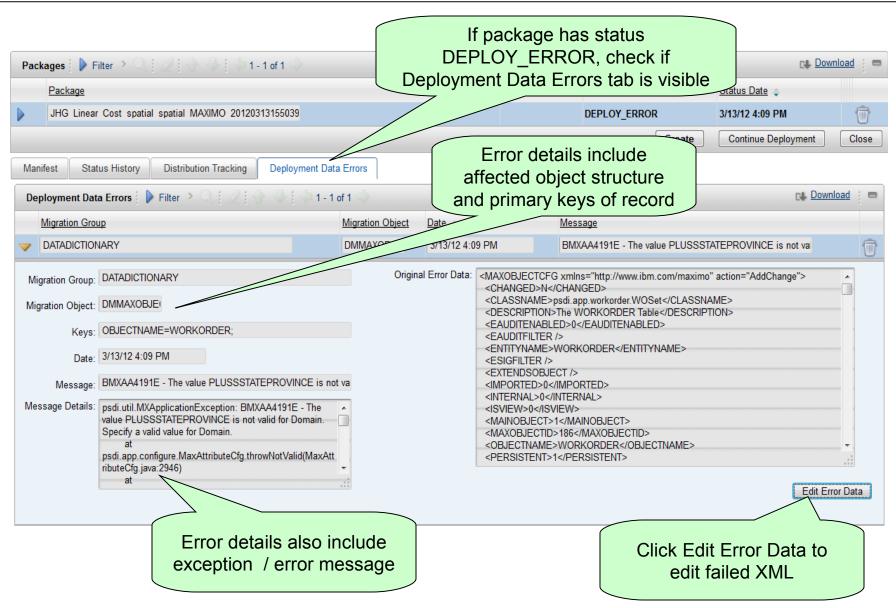


Error Correction and Package Re-processing

- In Maximo 7.1.x, deployment errors are costly
 - Usually implementers must return to source environment and re-create the package and/or re-start deployment
- In Maximo 7.5, deployment errors resulting from bad data in package can be corrected
 - New sub-tab in Package tab to view, edit and re-submit failing data
 - Deployment is 'paused' while error correction is performed
 - Original and corrected data displayed side-by-side
 - Deployment is 'resumed' once corrected data is saved
- Deployment errors resulting from missing / inactive system configurations in target can also be resolved in the same manner
 - Correct system configurations in target while package deployment is 'paused'
- If a package results in progressive errors, all error messages and data are saved
- NOTE: Deployment Data Errors tab displayed ONLY if error results from bad data in migration package XML

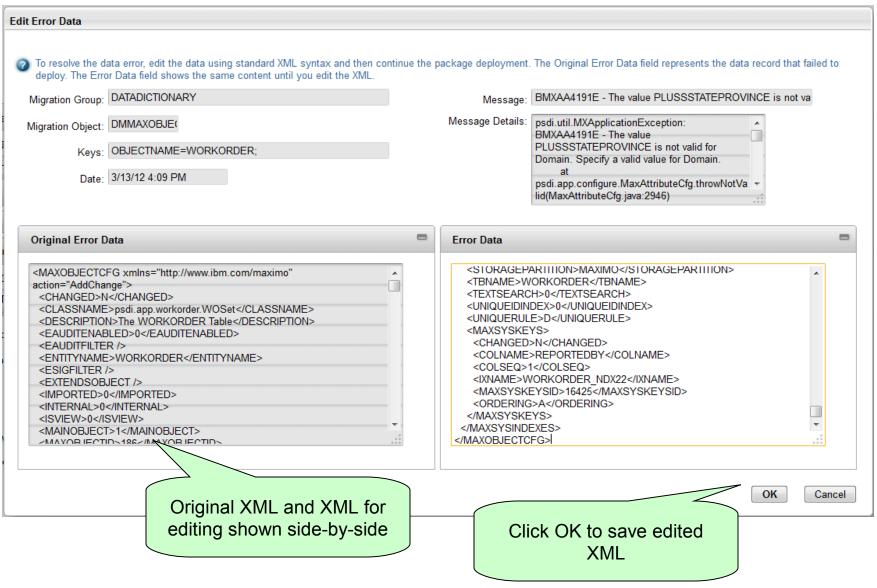
















Database Comparison

- Migrations can be accelerated if the differences between source and target database are known
- In Tpae 7.5, Migration Manager provides a Compare feature that compares system configurations
 - Package definition with at least one migration group is a pre-requisite to executing comparison
 - Any package definition type can be used to execute comparison
- Compare executes as a background task
 - Use 'Refresh Job Status' button to refresh results and status
- Comparison results are presented in the Migration Manager application
 - Ad hoc report provided out of the box





Database Comparison - scope

- Comparison executed from single source database against single target database
 - JDBC connectivity to target is pre-requisite
- Comparison can result in four possible outcomes :

Outcome	Description
Match	System configuration exists in both source and target and is a match
Difference	System configuration exists in both source and target but there is a difference
Local Only	System configuration is present only in the product environment where the comparison was executed
Remote Only	System configuration is present only in the product environment that was compared to

No support to configure only selected outcomes (all four outcomes will be determined)



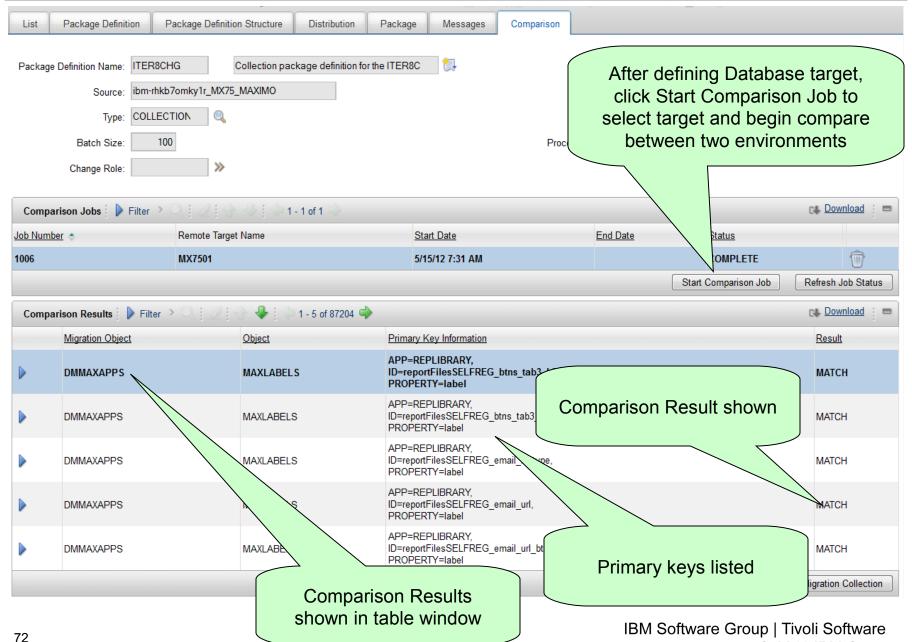
Database Comparison – Implementation models

- Comparison can drive development environment migrations to production
 - Identify differences, place identified system configurations into Migration collections
 - Migration Manager application provides action to place differences into migration collection
 - Only system configurations with 'Difference' and 'Local Only' outcomes can be placed into collection
- Comparison can be used post-deployment to verify match between source and target environments
 - Avoid time-consuming manual verification
- Comparison results can be discarded and re-run



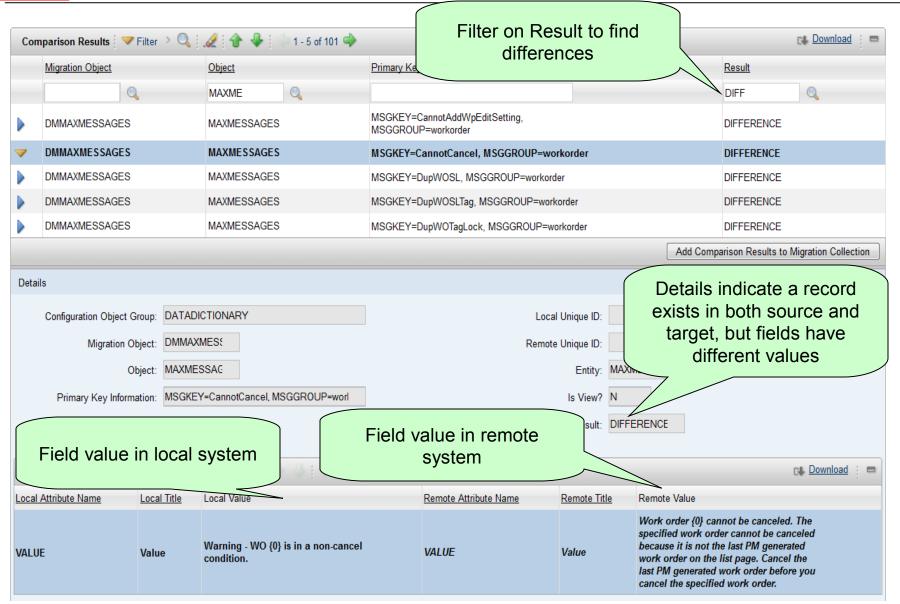


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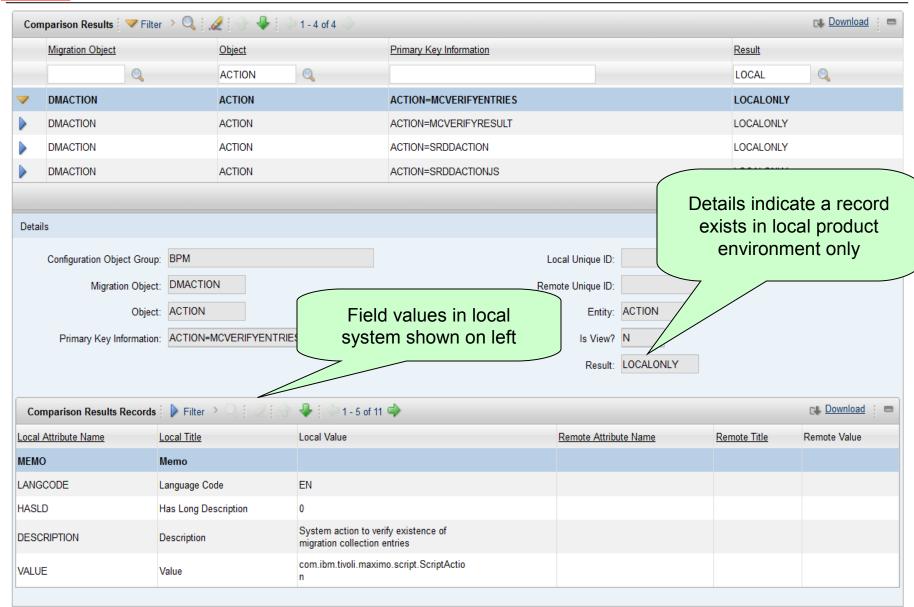
















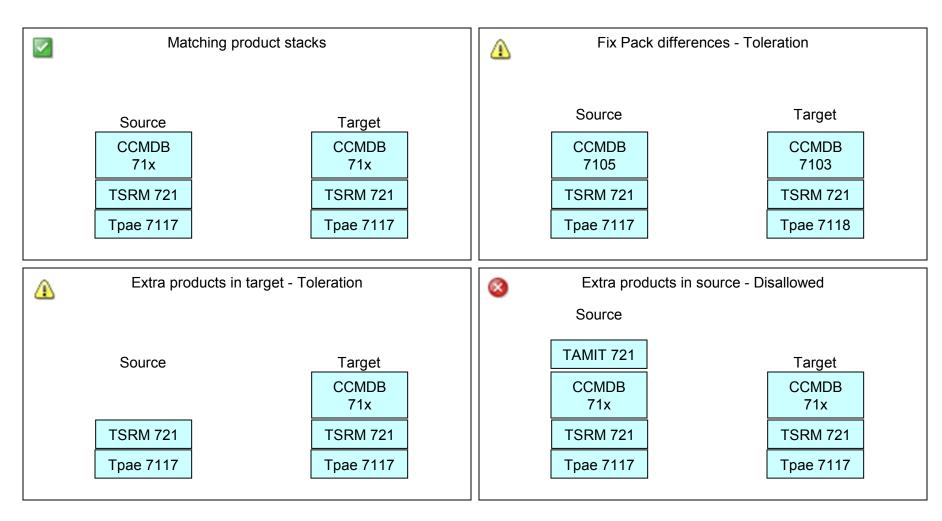
Product Compatibility Checks

- Source and target product environments have different products and versions installed
- In Maximo 7.1.x, Migration Manager supported the following:
 - For a product present in source and target:
 - Tolerate hot fix differences
 - · Tolerate fix pack version difference
 - For target environments with extra products than source, allow package deployment with warning
- Product and version differences imply:
 - Database level entity differences
 - Meta-data differences
 - Code differences
- Allowing migrations between environments with disparate product stacks can corrupt the product environments





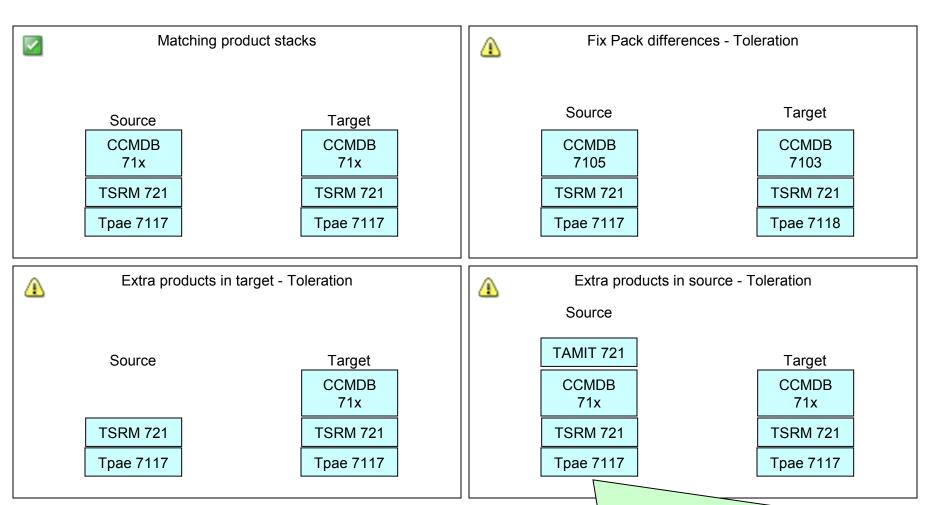
Product Compatibility Checks – Tpae 7.1.x







Product Compatibility Checks – Maximo 7.5



Maximo 7.5 enables implementers to exclude products in the source product stack from being compared with target product stack



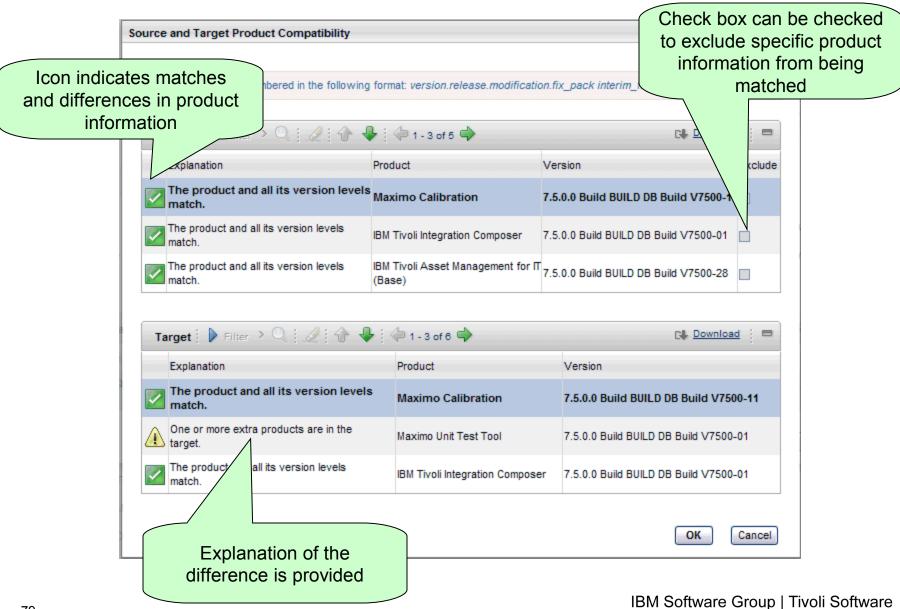
Product Compatibility Checks – Maximo 7.5

- Some PSI (product packaging) include generic system configuration content
 - Example, SRM Service Catalog Content 7.2.0.1
 - Other best practices or jump start content packages
- Migration becomes impossible since Migration Manager treats content packages the same as regular product packages
- Implementers can exclude from compatibility checks those products
 - Use exclusion with caution
 - Ad hoc use in truly different product environments can lead to deployment errors and system configuration corruption
- Recommendation is to maintain same product stacks in sources and targets





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Content changes

- DMMAXOBJECTCFG object structure can now be migrated across different RDBMS
 - Example, Oracle to DB2
 - Review limitations in Tpae Information Center
- DMQUERY object structure added to APPLICATION migration group
 - Migrates queries
- DMINTERACTION object structure to migrate web services interactions
- DMSCRIPT, DMLAUNCHPOINT object structures to migrate scripts
- DMWSREGISTRY object structure to migrate web services library entries
- Numerous bug fixes





Logging and troubleshooting

- 'dm' logger continues to remain the primary logger for all Migration Manager functions including Migration Collections
 - 'integration' and 'sql' loggers are also important to debug deployment errors
 - For all deployments prior to go-live, setting DEBUG level for 'dm' logger is recommended
- Integrity Checker should be executed in both source and target environments as pre-requisite to migration
 - Errors and warnings should be resolved prior to migration
- For smaller packages, consider utilizing Preview function to test data validity
- Planning for migration using published Redbook material strongly recommended





Logging and troubleshooting

- For invalid data errors at deployment, use debug logs to check if the SQL statement is executed against the database before the error is reported for the associated table and see if record is found
- Migration Collection validation may take additional time for certain scenarios depending on the number of related records found for a candidate configuration in the collection
 - System properties mxe.dm.collvalidlevels, mxe.dm.collvalidtgtexclude and mxe.dm.collvalidsrcexclude should be used in concert to tune the validation
 - Consider disabling related and lookup rules when large numbers of related records are found – break into multiple collections
 - Additionally, turning on debug logs will produce significant information
 on the extent of validation





Resources

- Maximo 7.5 Information Center for Migration Manager and Migration Collections application help
 - http://pic.dhe.ibm.com/infocenter/tivihelp/v49r1/topic/com.ibm.mbs.doc/gp_migmgr/c_ctr_mig_mgr_over.html
- Migration Manager Redbook for Maximo 7.1.x
 - http://www.redbooks.ibm.com/abstracts/sg247906.html?Open
- IBM Support Tech Notes
- Maximo WiKi
 - http://www.ibm.com/developerworks/wikis/display/maximo/Home
 - Content will be added over time