A. Overview

This document is intended to set out:

- What each of Birkbeck’s U4BW instances is to be used for, how it is to be updated, how those updates will be timed and controlled
- The arrangements for configuration management
- The arrangements for migration management
- The working assumptions related to instance management and data migration
- A note on the Migration Plan

B. Database instances

- **Development:** To be used during the implementation phase as the ‘Gold Configuration’ instance. Only signed-off, agreed configuration should be applied to this instance (see configuration management process). Only ‘static data’ should be applied to this instance. Any data that could reasonably be expected to change during the life of the implementation project should be applied through the migration process (whether that data currently exists in a legacy system or not is irrelevant – data that does not currently have a home in a legacy system can be housed in the data staging area).

The configuration in this instance will be used to clone fresh instances for IST, Migration Testing, Parallel Payroll Run Testing & eventually go live.

- **Test:** To be used for proof of concept development, and testing, unit testing and eventually Integrated System Testing.

  This instance will be refreshed **each Sunday** from the Gold Config, followed by a migration (initially from seed data, but soon thereafter from real Birkbeck data). The intention is that the migration process should be as automated as possible to allow it to be repeatable, reliable and fast.

- **Production:** To be used for parallel payroll run testing. Eventually the final parallel payroll run should be signed off as a perfect match of the legacy production system. This instance will then become the production system, without the need for further data migration.

- **Migration Test / Train:** This **additional temporary** instance will be required to allow migration testing to be carried out without interfering with the system P.O.C. and unit test work carried out in Test, and Parallel Payroll Run work in Production. Once Parallel Payroll run has commenced in earnest the use of this instance will switch to End User Training.

C. Configuration Management Concepts
A Seed Instance will be maintained, from which other instances can be cloned. This will contain the most up to date, signed off and agreed system configuration, consisting only of 'static' data.

Migration Routines will be developed that where possible script the application of 'non-static' data to a U4BW instance. This data will be a combination of
  - Data sourced from existing legacy applications (as is)
  - Data transformed from existing legacy applications (some mapping/transform performed)
  - 'New' data held in staging tables that might need to change over the course of the implementation project, and as such cannot form part of the static system config in the config instance. Held in staging tables so it can be included in the migration routine.

Where possible the migration routine will use U4BW Web Services to push data, gathered from source systems into a staging area, into U4BW. Where this is not possible, it will generate CSV/xlsx files, and prompt a user to apply the file manually and confirm that this has been completed. In this way the migration routine will seek to ensure that migration steps are carried out in the appropriate order, managing dependencies appropriately. The migration routine will log any errors encountered in the acquisition and pre-processing of source data from legacy systems, or the application of data to U4BW (where it is done directly using web services).

A configuration management group will meet each week on a Thursday morning – where proposals for updates of the configuration instance will be reviewed.

No updates to the configuration instance will be carried out without the agreement of the configuration management group this is to ensure that knock-on issues are understood and discussed

The configuration management group will insofar as possible
  - Identify proposals that will cause 'clashes' between different business areas/processes
  - Ensure consistency of approach
  - Check that appropriate unit testing has taken place before updates are made
  - Provide a group to review whether the update should be performed via an update to the configuration instance or the migration routine
  - Provide a forum to discuss any proposal to suspend the weekly clone operation.

 TEST/IST instance will be refreshed weekly – ideally on a Sunday morning from the DEV/Config instance. Ideally the migration routine will be scheduled to commence.

D. Instance Usage Timeline Diagrams

The following diagrams illustrate the usage of the instances from Sept 2016 to April 2017. N.B. for the sake of brevity some repetitive elements have been omitted.
E. Assumptions

a. HR/Payroll

i. Only HR/Payroll Data that is essential for production of payroll will be migrated into transactional tables in U4BW.

ii. Transactional HR/Payroll data migrated will be from 1st August 2016.

iii. All other HR/Payroll data that is to be retained from Alta HR will be migrated into non-core, non-transactional tables / flexi fields. This migration is not essential for go live and can happen after 1st April 2017.

b. Finance

i. All historic transactions from bluQube (from the implementation date of bluQube) will be migrated into U4BW, into the transactional tables, with an account rule of ‘Migrated Data’ and the legacy posting string.

ii. Historic transactions will not be mapped to the new chart of accounts.

iii. Historic transactions that relate to Research Grants & Contracts Projects will be posted with the relevant U4BW project code such that reports can be written to show the total income and expenditure against research projects.

iv. All Finance data that is required to be kept long-term from bluQube will be migrated somewhere within U4BW.

F. Migration Plan

A detailed migration plan will be developed that explains...
- Each data set required
- The dependencies between the data sets and hence the order of loading required
- The source data for each data set
- The possible methods of loading each data set

This will be based on information supplied/to be supplied by Darren ODonnell and Rob Cocklin.