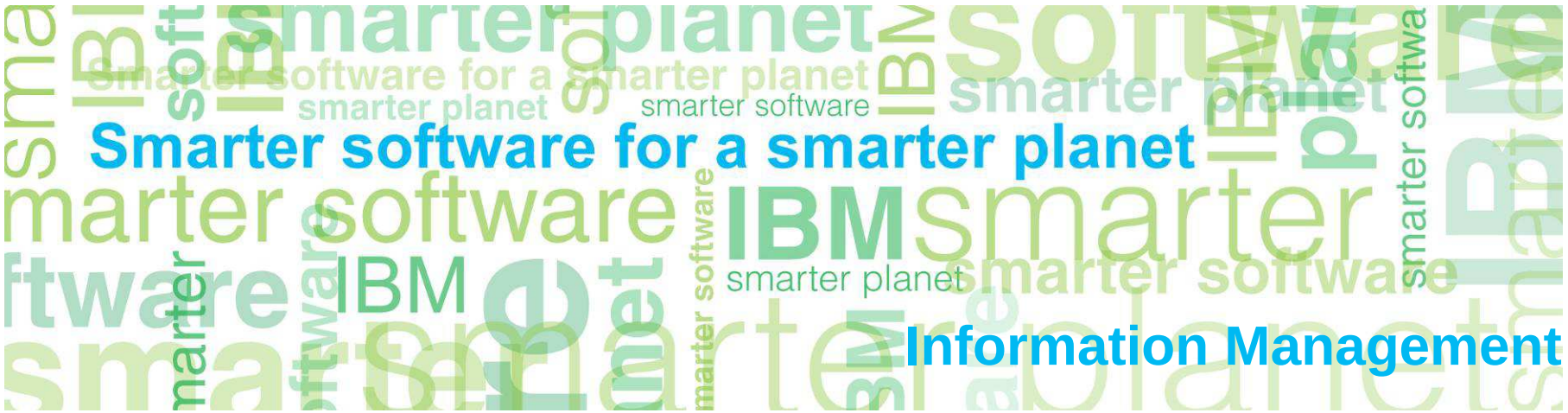
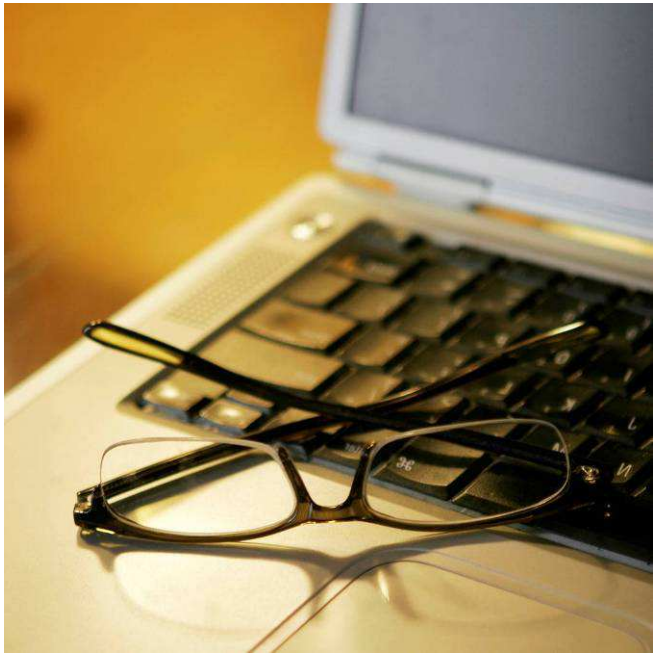
InfoSphere Optim Solutions: Application Retirement

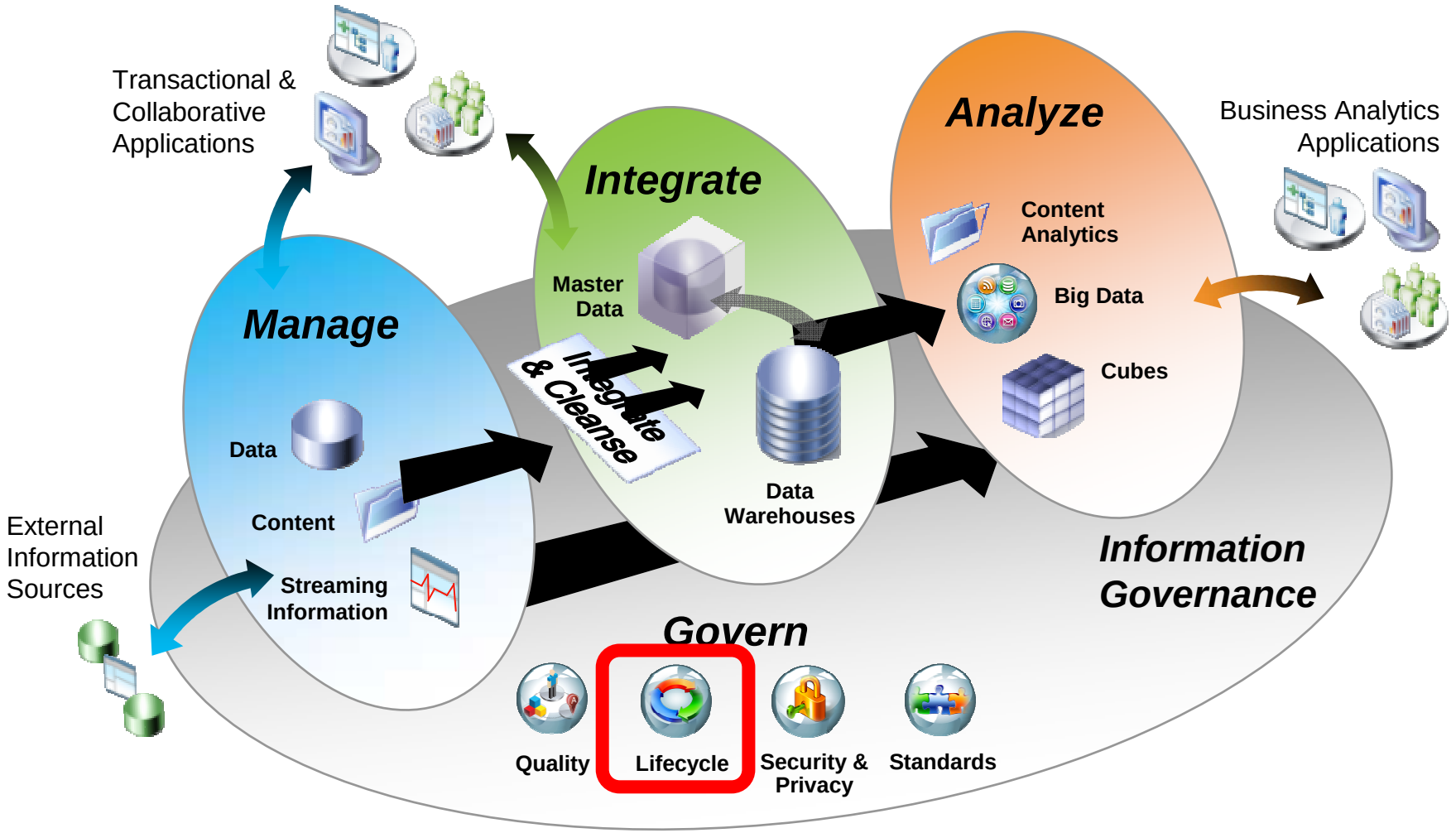


What we'll discuss

- Challenges managing the lifecycle of application data
- What's at Stake
- Effective application retirement
- IBM InfoSphere Optim Solutions for Application Retirement



Success requires governance across the “Information Supply Chain”



InfoSphere – Your Trusted Platform for Managing Trusted Information

Comprehensive

Most mature and comprehensive capabilitie across all of IIG

Integrated

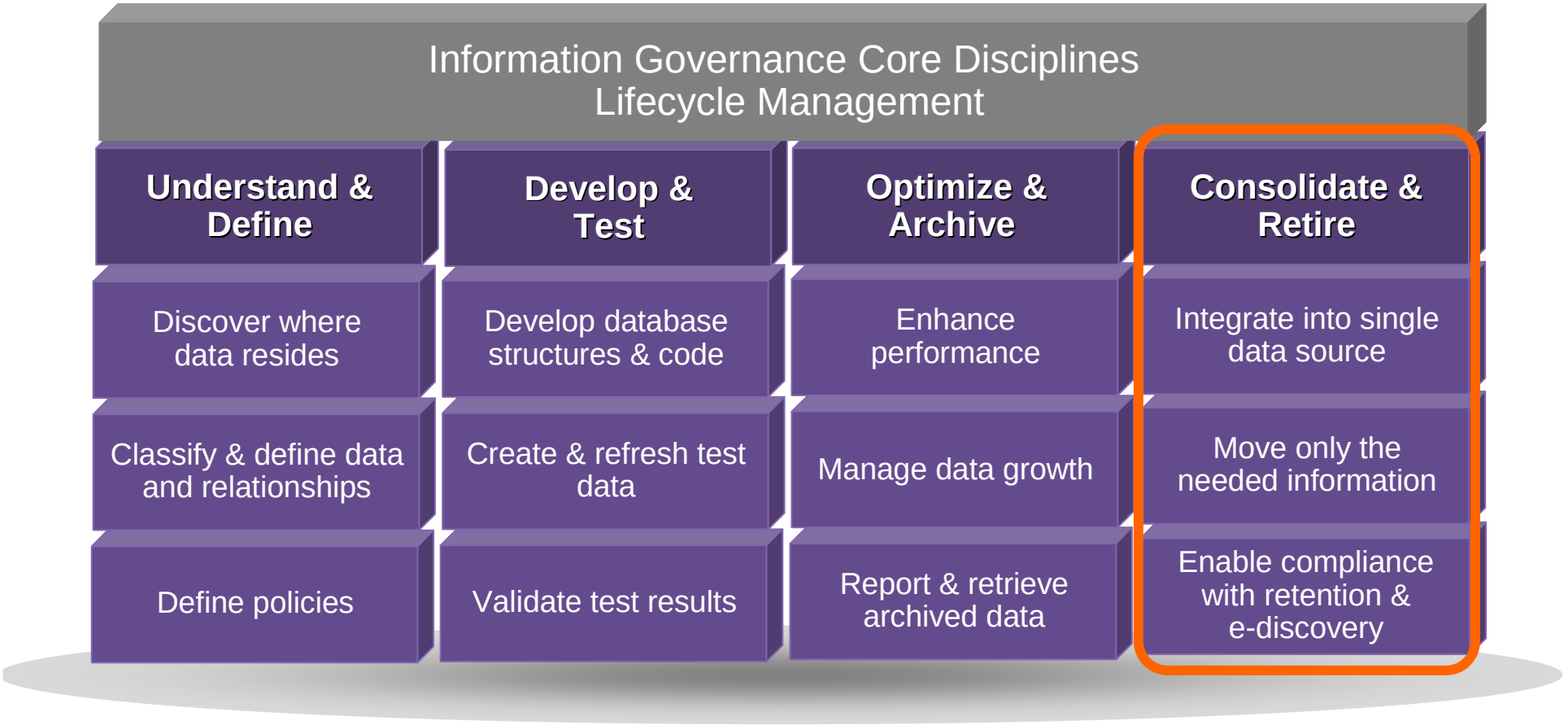
Integrated capabilities designed to address enterprise use cases

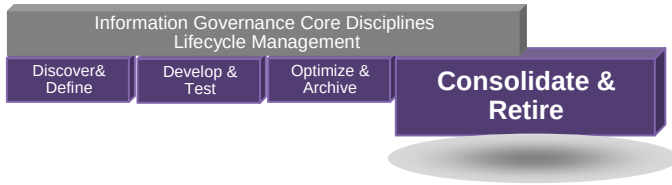
Intelligent

Prebuilt, Automated, Proactive

InfoSphere is the market leader in every category of Information Integration and Governance

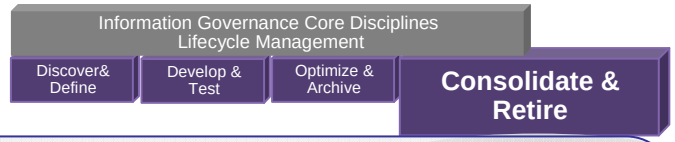
Requirements to manage data across its lifecycle



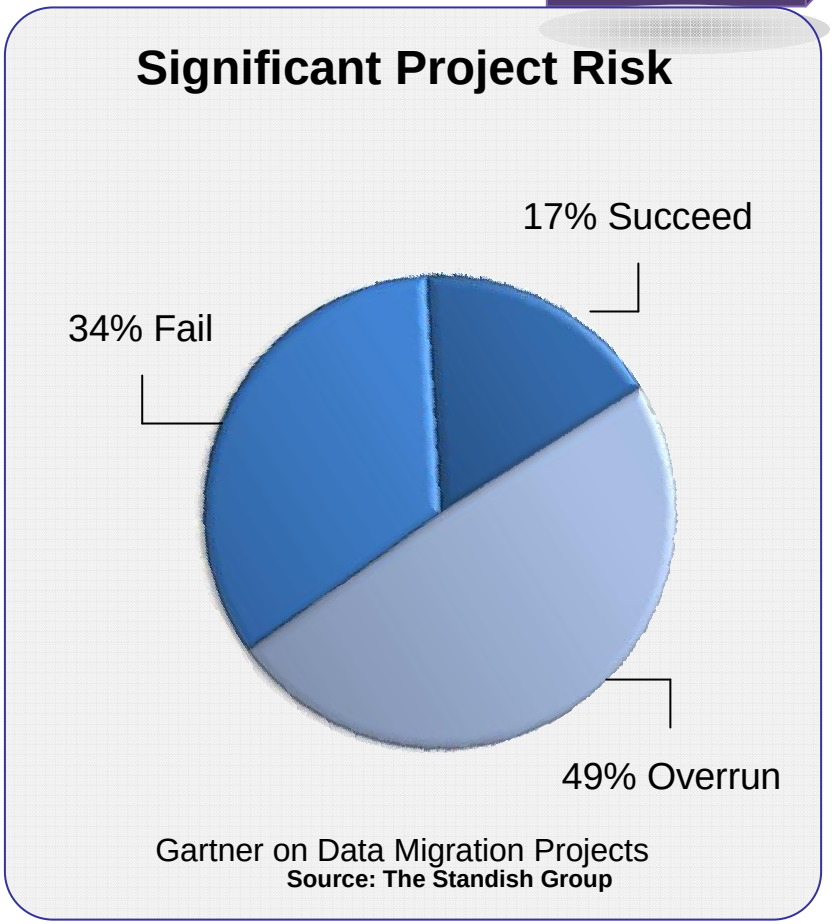


What's in Your Data Center?

What Are the Drivers Behind Application Consolidation & Retirement?

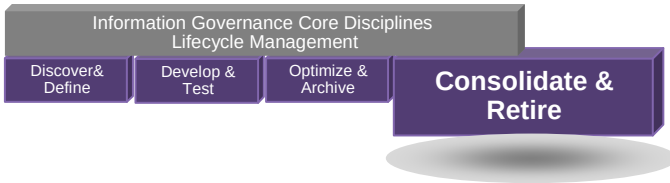


- Redundant systems acquired via mergers and acquisitions
- Divestiture of business line; application not needed
- Incompatible legacy technologies
  - Old versions no longer supported
- Required technical skills or application knowledge no longer available
- Potential liability associated with data kept beyond retention rules
- Budget pressures – do more with less



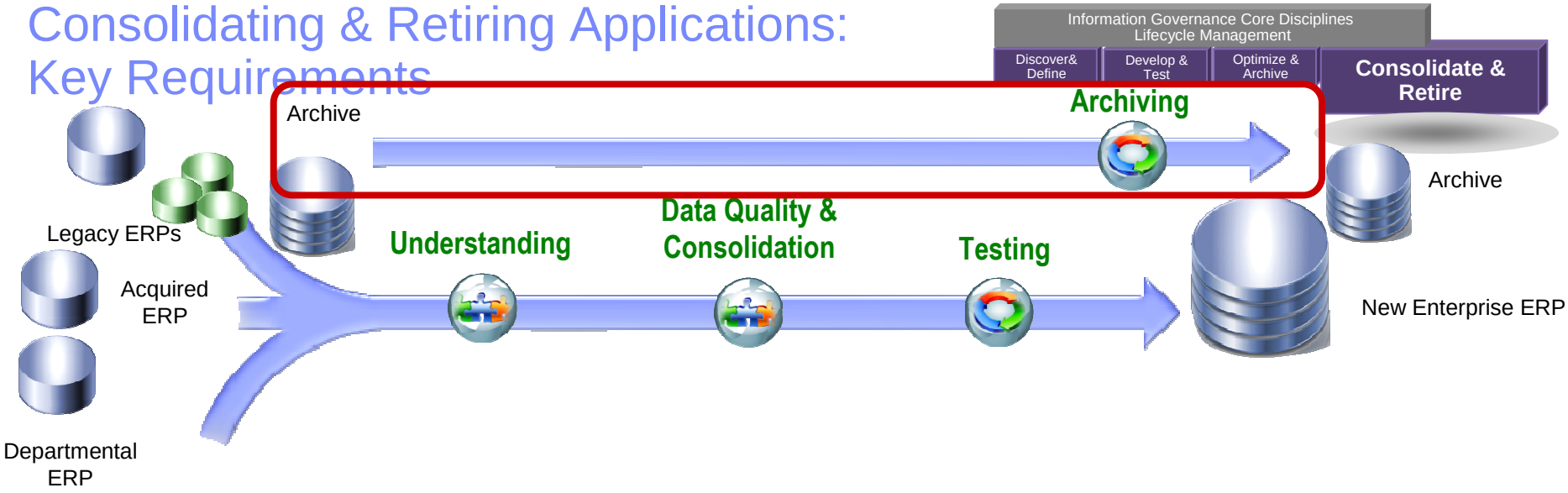
In almost ALL cases, access to legacy data MUST be retained while the application and database are eliminated.

The real organizational impact



- Legacy Applications cost a lot of money, old systems perform slowly
  - Batch jobs run into working hours, impacting end-user productivity
  - Service Level Agreements are being missed
  - Customer satisfaction declining
- As the production instance grows, so do back-up & non-production systems
  - If a failure occurs, how long will a database recovery take?
  - How many copies of production are being maintained?
- Managing large storage volumes negatively affects IT staff productivity
- Potential liability of keeping data beyond the data retention rules
  - How to access data from legacy or unsupported systems?

Consolidating & Retiring Applications: Key Requirements



Understanding

- Identify and understand data sources
- Identify and understand data retention policies

Data Quality & Consolidation

- Consolidate, integrate into new applications
- Maintain and enhance data quality

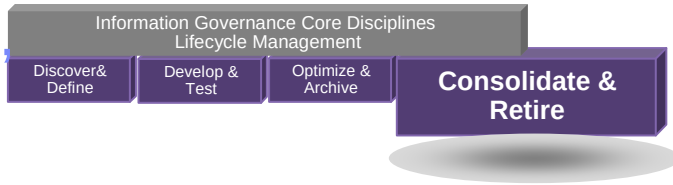
Testing

- Mask sensitive information
- Set right size subsets
- Compare before and after for test verification
- Refresh dataset (Dev. & DBAs)

Archiving

- Leverage independent data access
- Extract complete business objects
- Restore data selectively
- Use integrated retention compliance, defensible disposition

Create a Blueprint to Streamline the Project, Improve Predictability and Reduce Risk

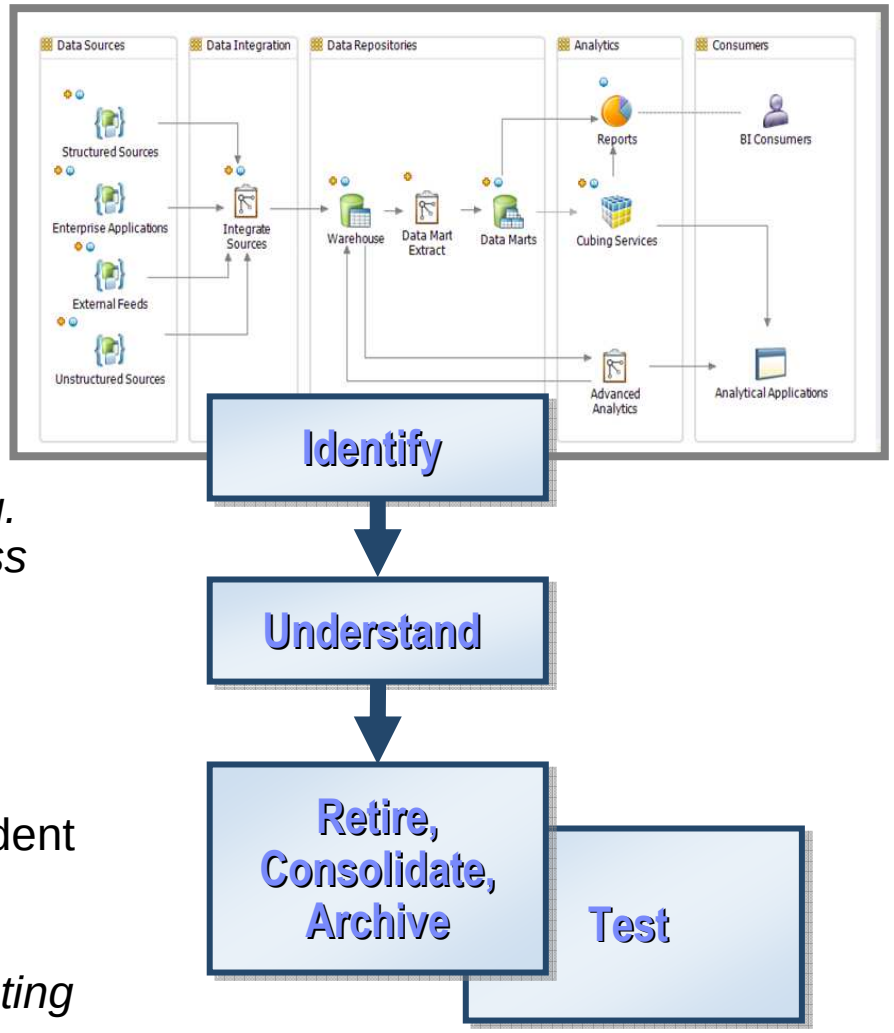


Blueprints enable project managers or application managers to document the vision and collaborate with IT & business to:

1. Identify all the sources that need to be consolidated and/or retired via a blueprint
   - *Leverage ILM blueprint to define your "as is" and "to be" landscape*
2. Understand the data retention policies associated with the sources
   - *Define associated retention policies (e.g. tiers, how business users need to access data, how long to keep the data)*
3. a. Retire application

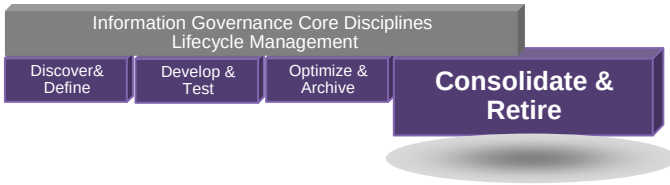
   b. Consolidate and integrate into new applications

   c. Archive to server for application independent access
   - *Access best practices and reusable methodologies for consolidation and testing (e.g. test data management)*



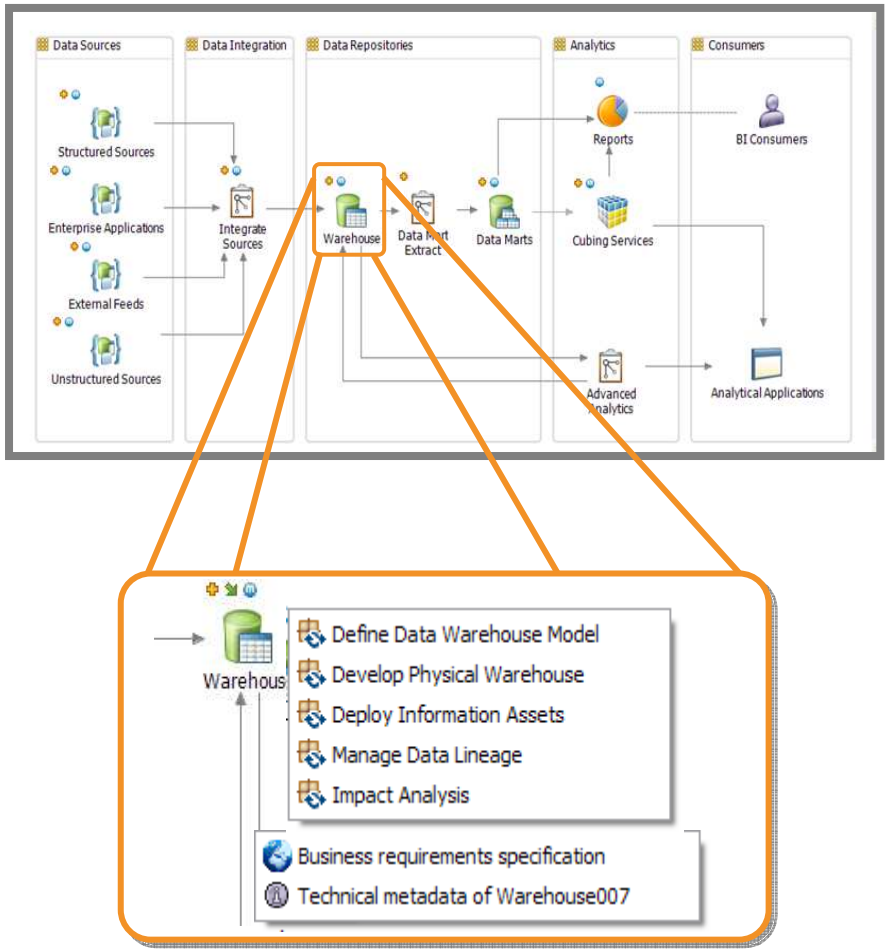
InfoSphere Blueprint Director

Vision – Execution – Completion

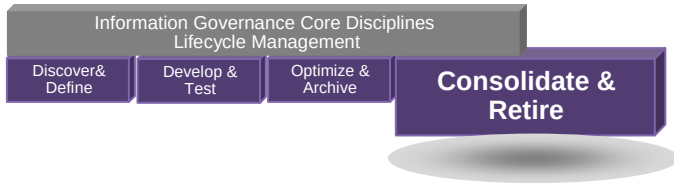


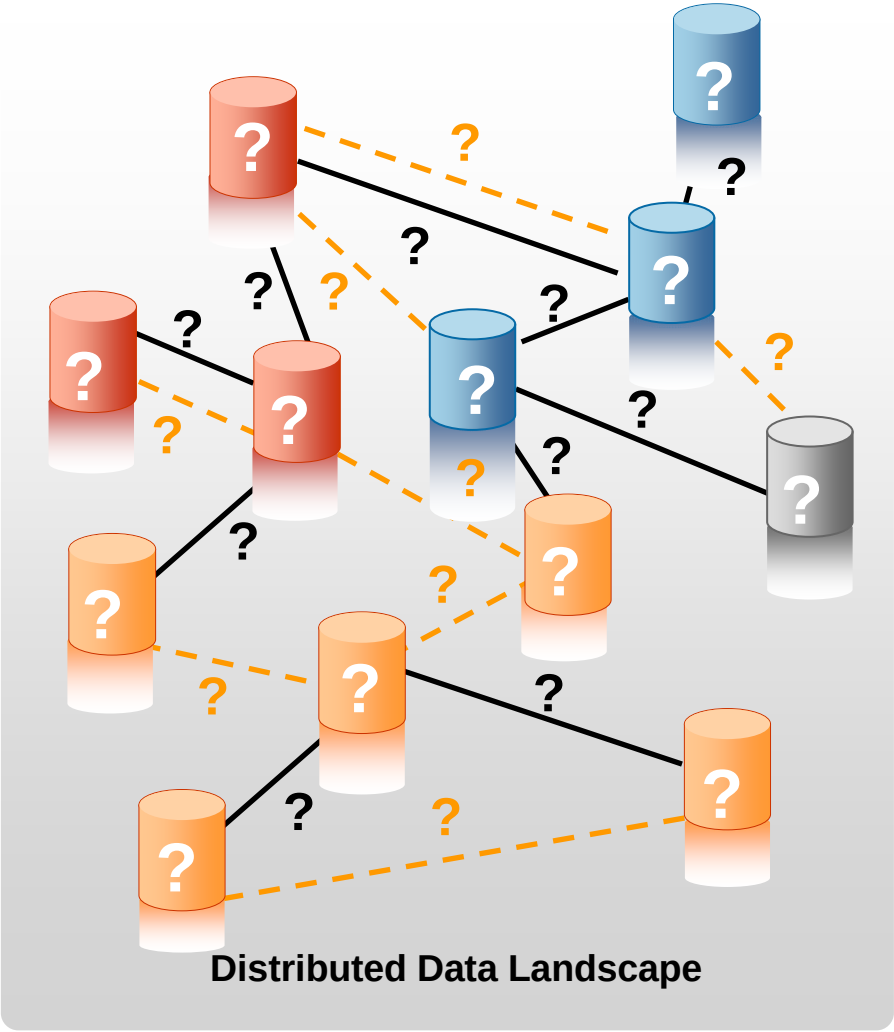
- Improve predictability and success of the project by linking blueprints to:
  - Reference architecture
  - Reusable best practices and methodology
  - Business and technical artifacts

- Provides control and insight of the information roadmap and its evolution through a collaborative lifecycle:
  - Vision
  - Execution
  - Completion



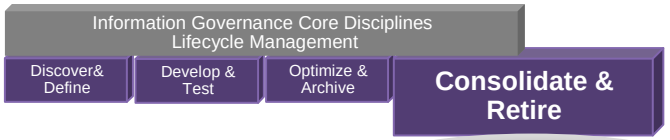
Understand where dormant data lives





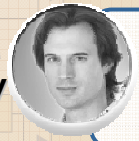
- Data can be distributed over multiple applications, databases and platforms
  - Where are those databases located?
  - Which databases are accessed and which are not on a regular basis?
- Complex, poorly documented data relationships
  - Whole and partial data elements can be found in hundreds of tables and fields
- Data relationships not understood because:
  - Corporate memory is poor
  - Documentation is poor or nonexistent
  - Logical relationships (enforced through application logic or business rules) are hidden

Discover & define business objects



Business View

Overall historical "snapshot" of business activity, representing an application data record – e.g. payment, invoice, customer



DBA View

Referentially-intact subsets of data across related tables & applications, including metadata.

CRM on Oracle database

Custom Inventory Mgmt on DB2

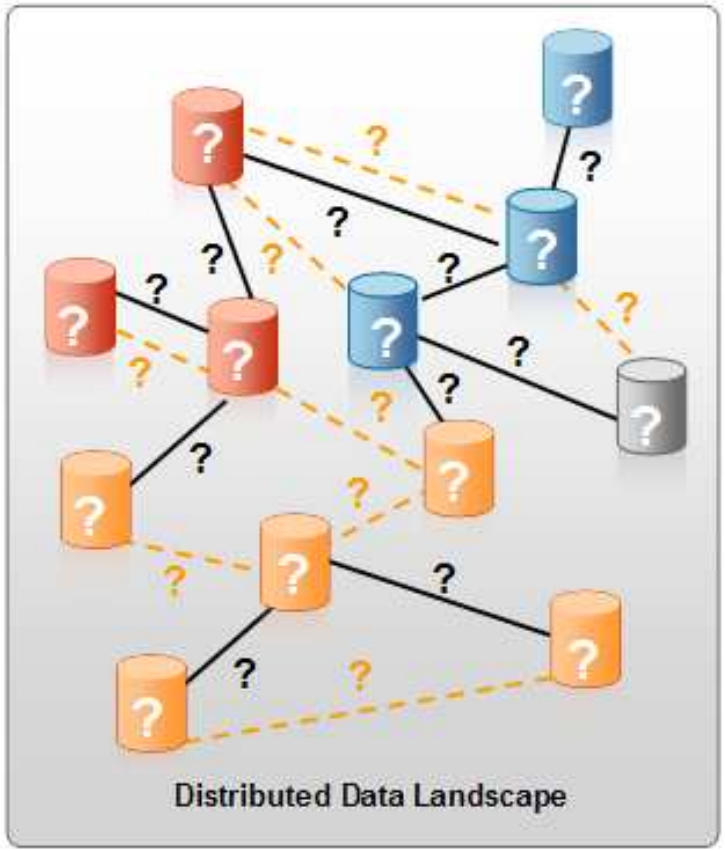
ERP / Financials on DB2

Federated access to related business objects across the enterprise

IBM InfoSphere Discovery

Discovery

Accelerate project deployment by automating discovery of your distributed data landscape



Information Governance Core Disciplines
Lifecycle Management

Discover& Define | Develop & Test | Optimize & Archive | **Consolidate & Retire**

Requirements

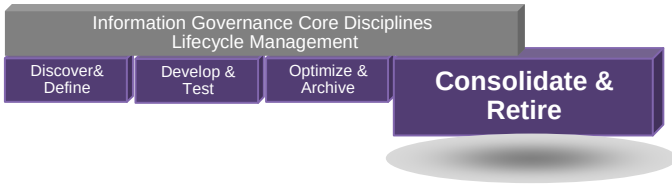
- Define business objects for archival and test data applications
- Discover data transformation rules and heterogeneous relationships
- Identify hidden sensitive data for privacy

Benefits

- Automation of manual activities accelerates time to value
- Business insight into data relationships reduces project risk
- Provides consistency across information agenda projects

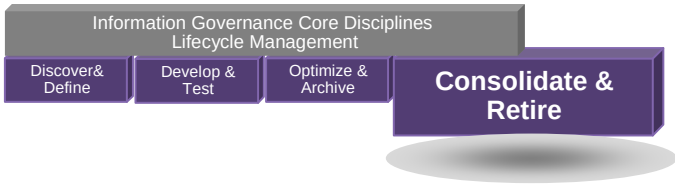
Determine data retention policies

Example of retention classification

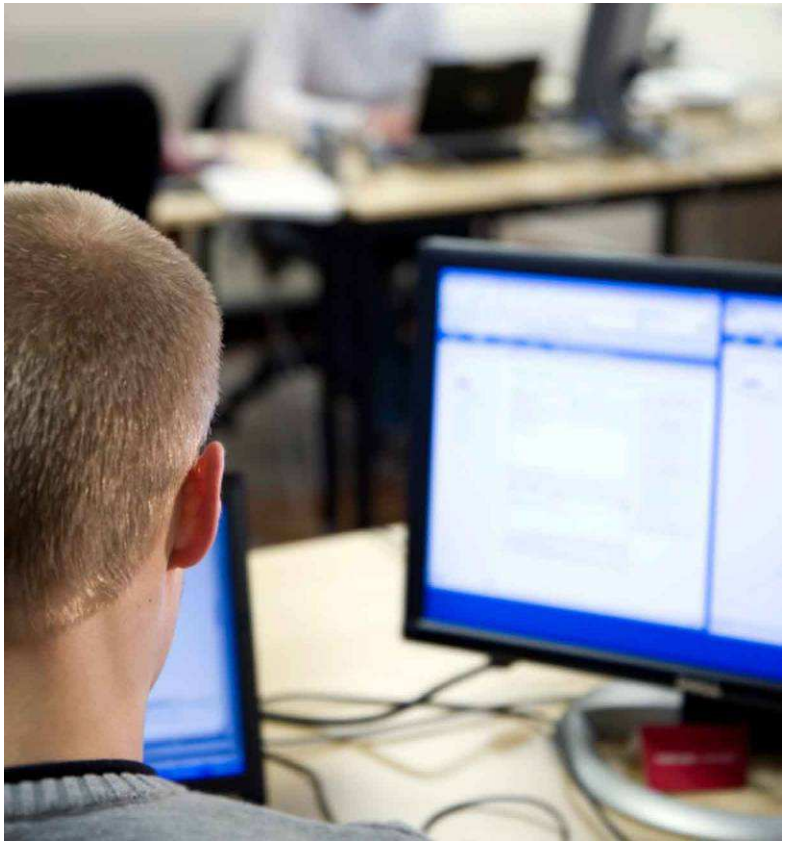


Functional Usage / Access Requirements Over Time				
Functional Data	Frequent, Application-Based Access	Infrequent Ad-Hoc, Query-based Access (Self-Help)	Exception-based, Application-Independent Access (24-hour SLA)	Complete Deletion (Dictates storage planning)
Accounts Payable	24 Months	Years 3 – 5	Years 6 – 10	Years 11
Accounts Receivable	24 Months	Years 3 – 5	Years 6 – 10	Years 11
General Ledger Account Balance	24 Months	Years 3 – 5	Years 6 – 10	Years 11
Work Orders	12 Months Rolling	Years 2 – 5	Years 6 – 10	Years 11
Inventory	12 Months Rolling	Years 2 – 5	Years 6 – 10	Years 11
Sales Order	12 Months Rolling	Years 2 – 5	Years 6 – 10	Years 11
Purchase Orders	12 Months Rolling	Years 2 – 5	Years 6 – 10	Years 11
HR/Payroll	12 Months Rolling	Years 2 – 5	Years 6 – 10	Years 11

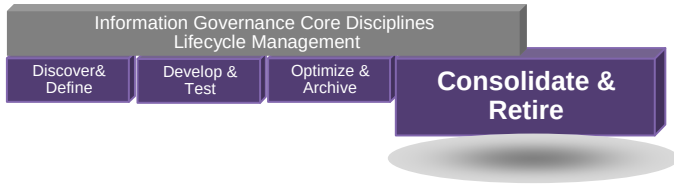
Archiving requirements for application consolidation

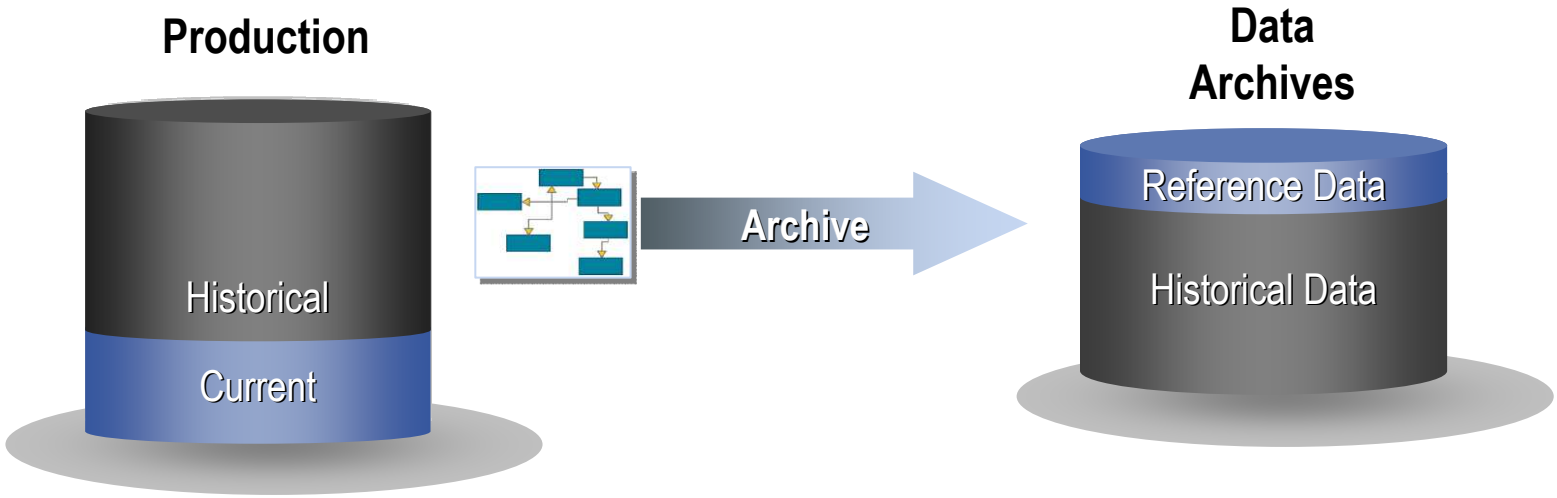


- Ensure Comprehensive Application Coverage
  - Support of enterprise applications
- Extract the Complete “business object”
  - Adhere to application data business rules
  - Include reference data
  - Extract and maintain metadata
- Support ILM Strategies
  - Support tiered storage model
- Universal Access to Data
  - Ensure the ability to browse and report data



How does archiving work?

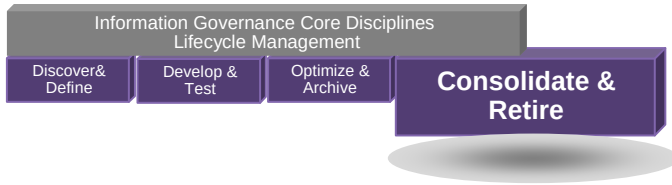


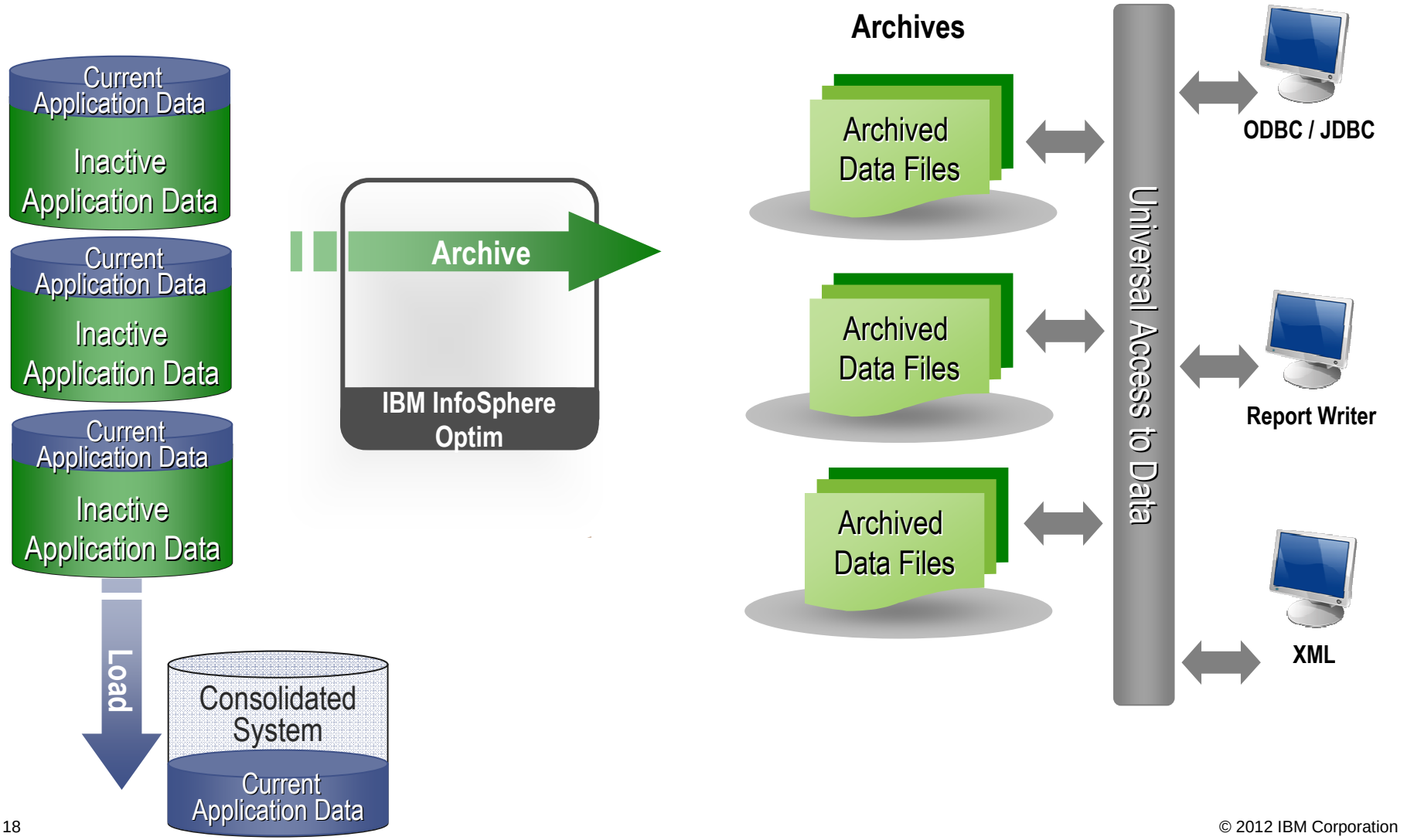


Data archiving offers a viable option for low-cost data storage that allows data to remain easily accessible to users and processes.

Source: Forrester Research – "Your Enterprise Data Archiving Strategy", N. Yuhanna, February 2011

Store historical business transactions in audit-ready "point in time" format

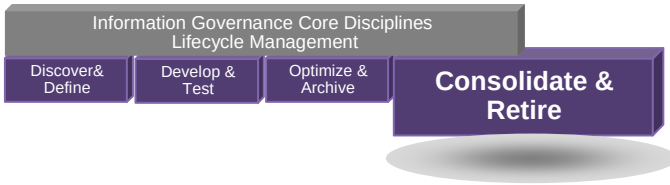


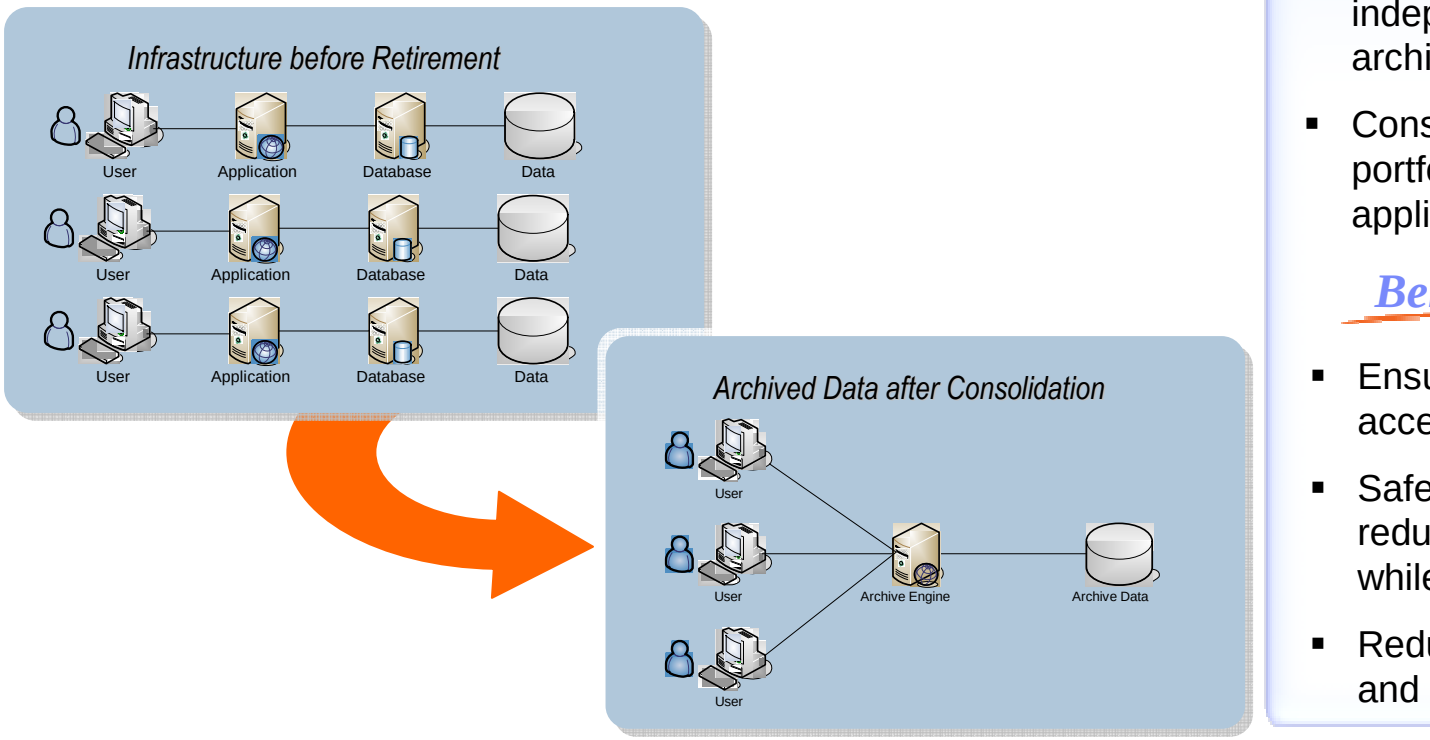


IBM InfoSphere Optim Solution for Application Retirement

Application Retirement

Manage and provide access to application data as part of an application retirement project





Requirements

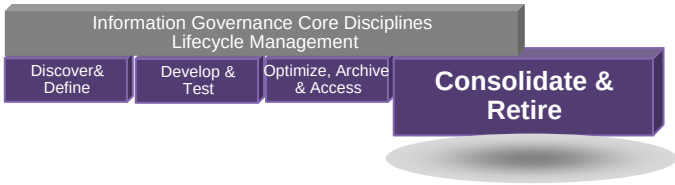
- Archive, manage and retain application data according to data retention policies
- Provide application independent access to archived data
- Consolidate application portfolio and retire legacy applications

Benefits

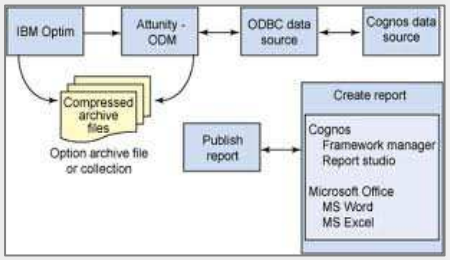
- Ensure compliance and access to valuable data
- Safely retire legacy & redundant applications while retaining the data
- Reduce hardware, storage and maintenance costs

Access methods for archived data

Leverage what best suits the end-user's needs

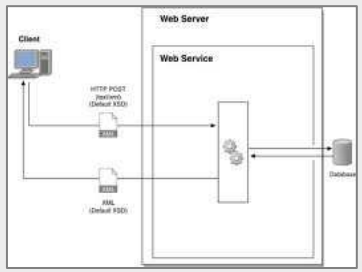


ODBC/JDBC



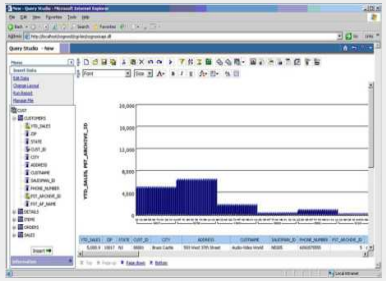
- SQL
- Custom application access
- DBA and developer access

XML



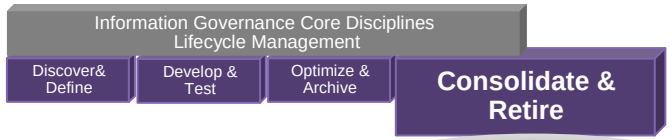
- Industry standards
- Messaging services
- Customizations

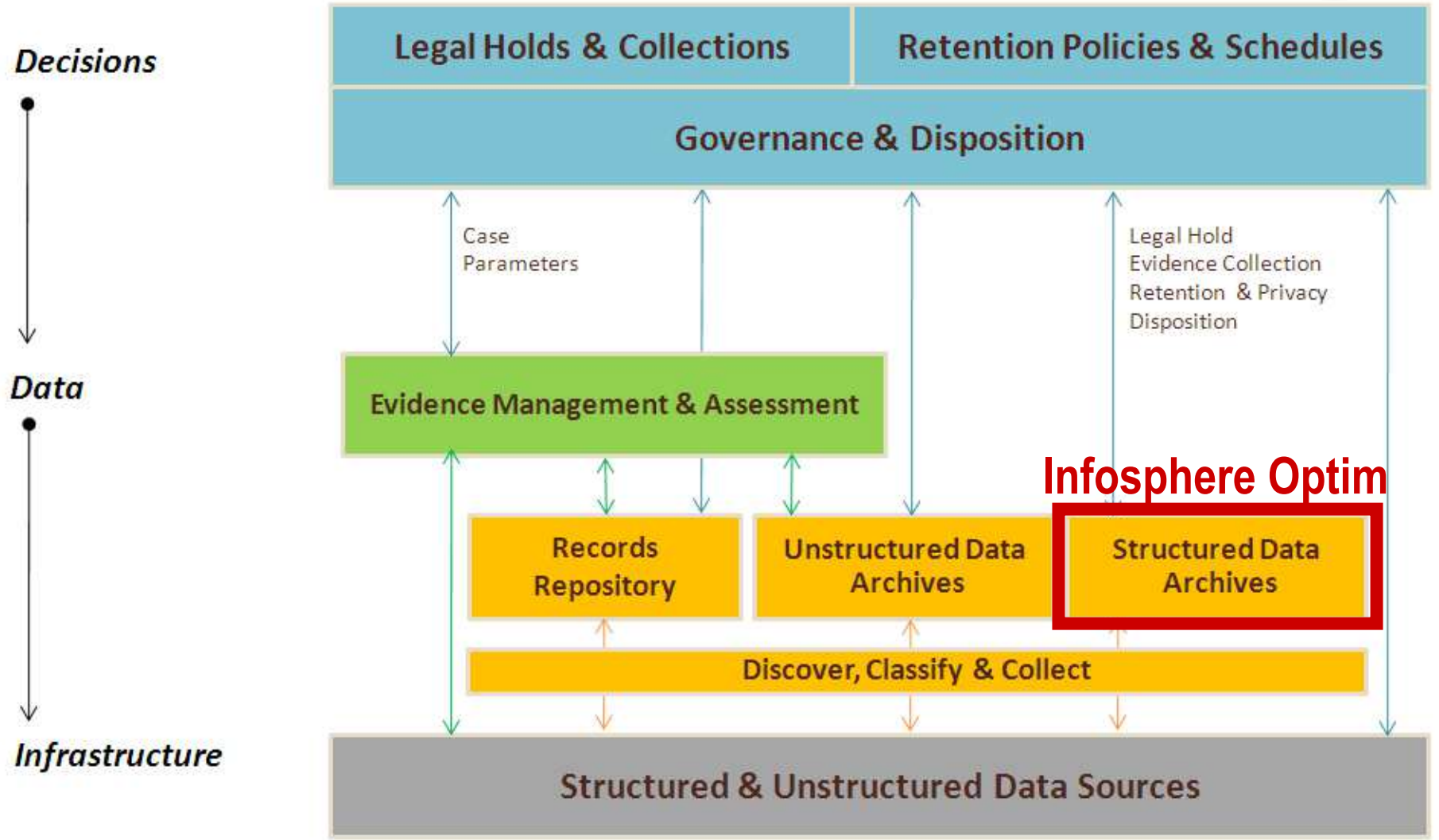
Third-Party Reporting



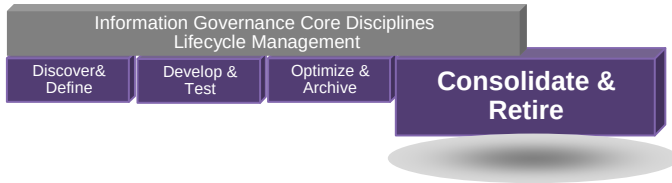
- Leverage existing tools
- Existing skills used
- Analysis of data

Unified Lifecycle Governance Logical Model

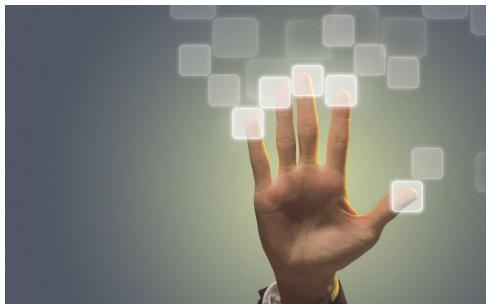




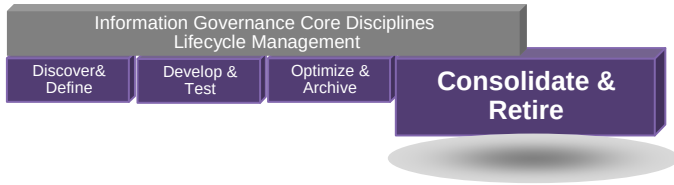
Managing the data lifecycle for retention, disposal & e-discovery

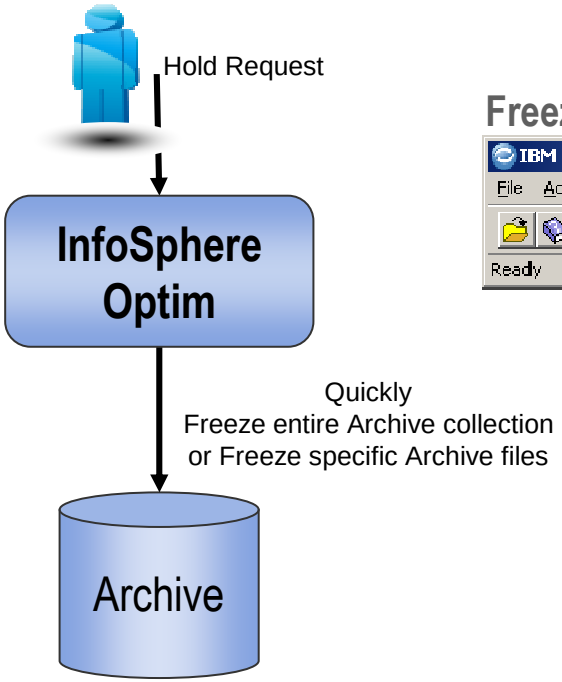


- Effectively archive application data
  - Discover & identify data record types across heterogeneous environments
  - Propagate policies automatically from a Policy & Schedule Management solution into InfoSphere Optim
  - Archive hold for all archive files, regardless of disposal schedule, for fulfilling legal hold requirements
- Capture and store data in its original business context
  - Preserve enterprise application data
  - NEW Facilitate e-discovery and selectively parse archived data for fulfilling legal hold requirements
- Ensure application-independent access of archived data
  - Archive with reference data to support long-term access to historical records

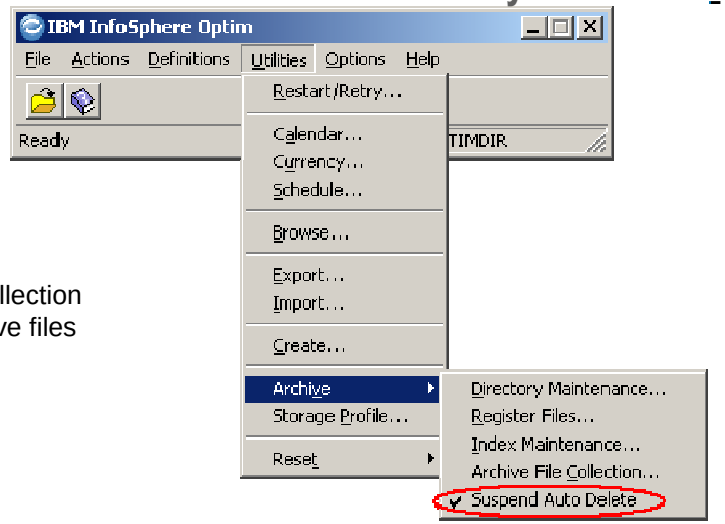


Legal Hold Use Case
Initial Hold or eDiscovery Request

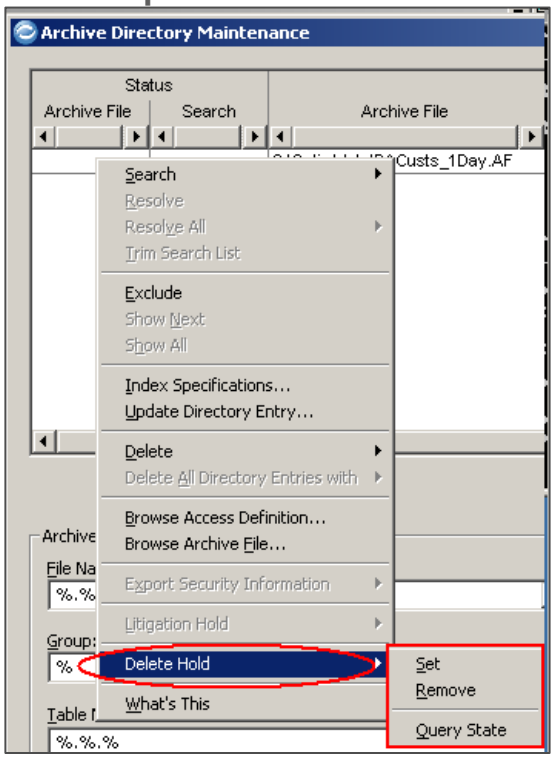




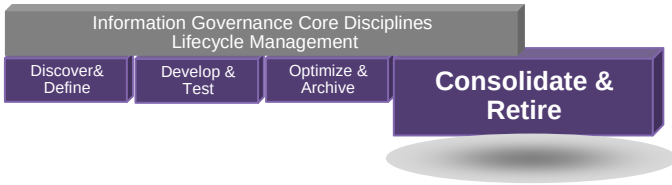
Freeze entire Archive directory

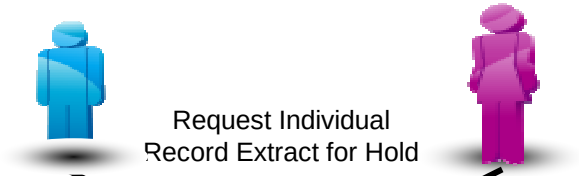


Freeze specific Archive files



Legal Hold Use Case
Information Discovered & Legal Hold Executed





Request Individual Record Extract for Hold

Hold Request 1

Hold Request 2

InfoSphere Optim

Archive

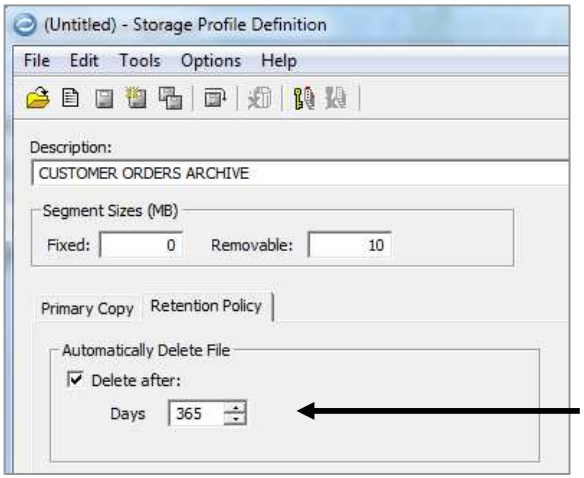
NEW

Extract copy of Record for Hold

Record(s) on Hold #1 with related content

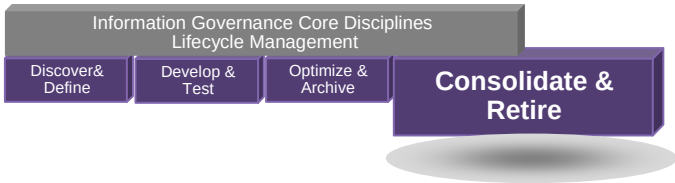
Record(s) on Hold #2 with other related content

Hold until no longer needed for legal hold

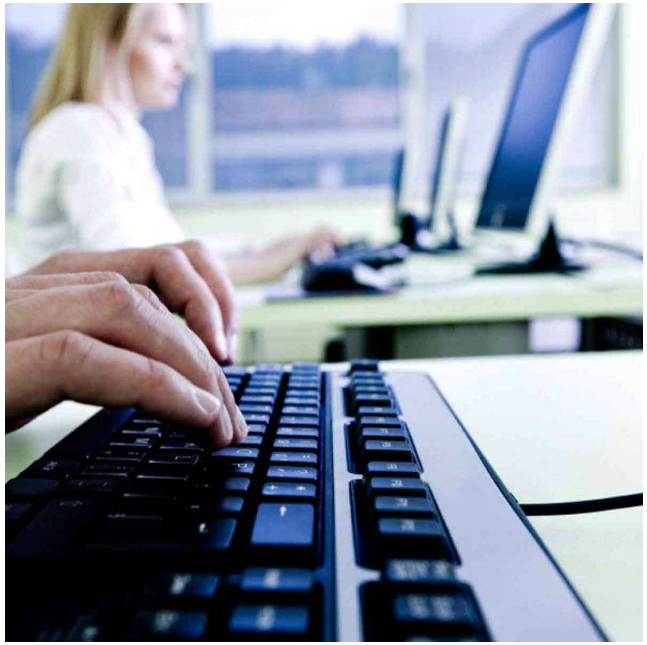


Archive file(s) continue on lifecycle until disposal time that was set in the InfoSphere Optim **Storage Profile**

The Benefits of Application Retirement



- Reduce costs while supporting compliance with data retention regulations
  - Retire applications without having to move all data into new systems or keep retired systems available for access
  - Consolidate multiple applications and data stores while maintaining access to required data
- Minimize the risk of retiring enterprise applications
  - Collect, manage and store application data securely for long term retention compliance
- Improve business performance
  - Reduce IT infrastructure and retire legacy systems no longer supported by vendor or staff



Customer Spotlight: AEP Consolidates, Migrates and Retires Applications with InfoSphere

The Challenges:

- Cost effectively retain 50 years of GL data impeded by managing over 25 unsupported financial legacy applications
- Respond accurately & timely to data retention and industry regulatory compliance impacted by multiple M&A applications

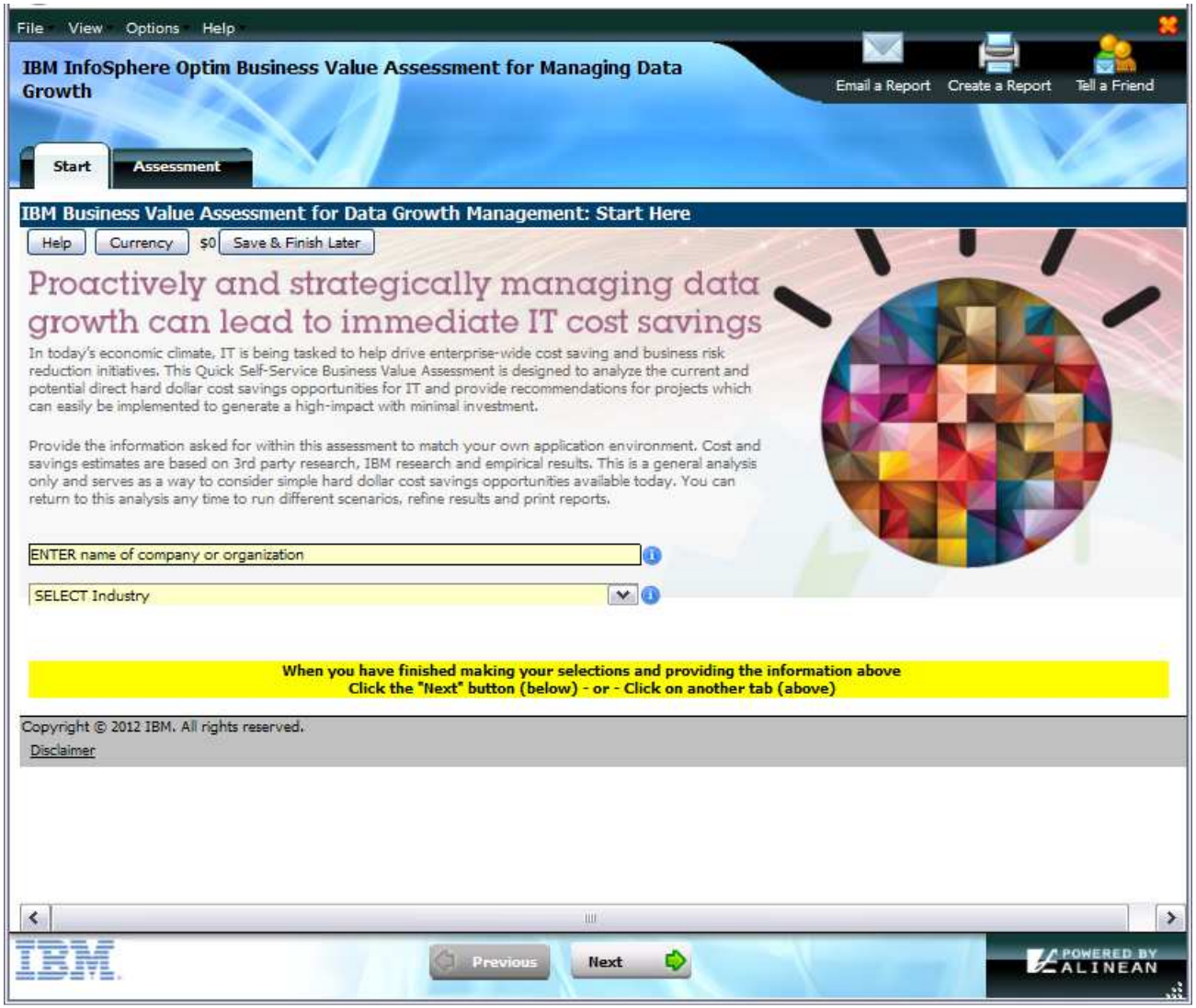
Bottom line:

- Retired 25+ legacy applications
- Consolidated multiple instances of PeopleSoft
- Passed SOX audit with repeatable assets
- Increased financial data supportability with universal access to data
- Increased operational system performance & decreased expenses

AEP AMERICAN® ELECTRIC POWER

Leverage Self Service BVA to make the business case analysis

- Use the following link to do a quick business value assessment!
  https://roianalyst.alinean.com/ibm/AutoLogin.do?d=8192808312571766 35



Summary

- Application retirement has become a necessity
- Even though an application is retired, the data must be retained
  - It doesn't make economic or technical sense to move all data into a consolidated application/database
- Access to archived data must be available independent of the application
- Archiving data from retired applications provides
  - Independent access to data
  - Reduced cost of storage
  - Increased application performance

Learn more

- Product Family Webpage
- Solution Sheet: InfoSphere Optim Data Growth Solution brief
- Whitepaper: Control Application Data Before it Controls Your Business
- Whitepaper: Application consolidation and decommissioning projects: strategies that deliver ROI