

The Hitchhiker's Guide to

POPUP MAINFRAME

A Definitive Setup Manual for PopUp Mainframe & Delphix

Delivery Manual for PopUp Mainframe & Delphix



Delphix

Delivery Manual

Roles & Responsibilities



Project Sponsor

- Funds the project.
- Could be a combination of: CTO office, mainframe modernisation, environments, and testing.



Transformation Lead

- Person accountable for the success of the project.
- Could be called Transformation Driver, Modernisation Lead, or Principal DevOps Consultant. Regardless of title, this person must be expert in leading the change management of technology, ensuring long term adoption of new ways of working.
- Represents the interests of the business. Ensures that the project and PopUp implementation meets the demands of the business.
- Works closely with Project Sponsor to understand the business drivers and goals/objectives.



Architecture Lead

- Team or individual responsible for the design of the PopUp & Delphix solution.
- Ensures the solution meets the clients local standards in respect to moving data and design principles.
- Team or individual responsible for the design of Security roles and access levels



Linux Admin

- Team responsible for any Linux system admin that the PopUp team cannot access. Access restriction is usually due to security policy.



VM and/or Cloud Admin

- Team responsible for the build and administration of the VMs (on prem or cloud) and associated disk space.



Application SME(s)

- Team who understand and support the application that is being established on the PopUp. This could be a combination of development and support resources that are responsible for building and maintaining the application.
- Usually, application DBAs are aligned to this team along with CICS, IMS and MQ programmers that define the application components, e.g. Db2 tables, CICS transactions and MQ Queues.



Mainframe Sys Progs

- System programming and storage activities: administration and allocation of storage volumes on the physical mainframe, and administration of z/OS, Db2, CICS, IMS, and MQ on the PopUp.



Network Admin

- Team responsible for ensuring firewalls are open between the physical mainframe, PopUp and Delphix. Direction on what is required comes from the PopUp team.



PopUp Team

- The PopUp team delivers all the hands on PopUp and Delphix activities.
- In addition, they have the skills to deliver these roles:
 - Mainframe
 - Application (PopUp can install client applications providing there is documentation and access to existing systems)
 - Architecture (PopUp can work with the enterprise architecture team to deliver architecture blueprints to client standards)
 - VM and/or Cloud
 - Linux Admin
- The PopUp team frequently delivers mainframe and application tasks for clients. These resources are often outsourced (for the physical mainframe), or there is simply a shortage.



A1. Project Definition & Kickoff



A2. Architecture & Application Discovery



B3. PopUp & Delphix Infrastructure Setup
[System Requirements](#)
[Setup Guide](#)



B4. Data Migration Preparation



B5. PopUp & Delphix Configuration



B6. Data Transport, Application Build in PopUp



B7. PopUp Virtualisation "Gold Copy"

People & Teams

-  Project Sponsor
-  Transformation Lead
-  Architecture
-  Linux Admin
-  VM and/or Cloud
-  Application
-  Mainframe
-  Network Admin
-  PopUp

A. Setup & Preparation Activities

Most activities owned and performed by the customer

B. Installation & Virtualisation Activities

Most activities owned and performed by PopUp team

A1.

Project Definition & Kickoff

Entry Criteria for this Phase

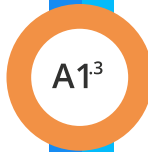
- Current state: High level challenges
- Future state: Project (or POV) objectives



Project Kickoff Meeting




Project Scope Workshop



Create Use Cases, Validation Points, Project Progress Tracker

 [Use Cases & Validation Points Template](#)

 [Progress Tracker Template](#)

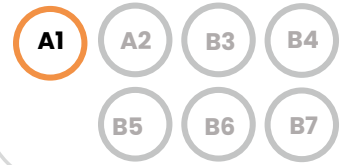


Create Project Charter

 [Template](#)



Project Charter Review & Signoff



People & Teams

-  Project Sponsor
-  Transformation Lead
-  Architecture
-  Linux Admin
-  VM and/or Cloud
-  Application
-  Mainframe
-  Network Admin
-  PopUp

Exit Criteria for this Phase

- Project Charter:
 - Project (or POV) scope
 - Use Cases (Validation Points)
 - Project (or POV) success criteria

A2 Next Phase Unlocked

A2

A1

A2

B3

B4

B5

B6

B7

A2.

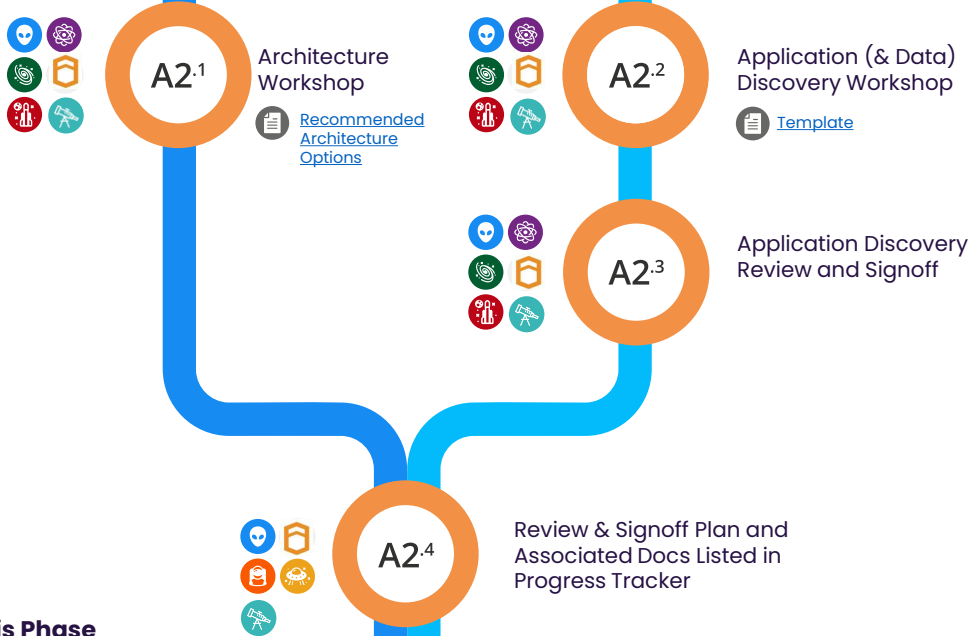
Architecture & Application Discovery

Entry Criteria for this Phase

- Project Charter
- Current systems architecture for applications in scope

People & Teams

- Project Sponsor
- Transformation Lead
- Architecture
- Linux Admin
- VM and/or Cloud
- Application
- Mainframe
- Network Admin
- PopUp



Exit Criteria for this Phase

- Project Progress Tracker with links to signed off documents:
 - Full infrastructure blueprint (logical arch, network arch, VM requirements, z/OS software)
 - Data migration strategy (e.g. Migration Server or Connect:Direct)
 - List of applications in scope for project
 - Network requirements for in-scope applications
 - List of data and application components to be virtualised (including sizing details)
 - List of data fields types to be masked (if applicable) (Data Privacy Policy)

B3

Next Phase Unlocked

B3

PopUp & Delphix Infrastructure Setup

Entry Criteria for this Phase

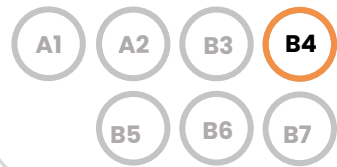
Signed off documents:

- Full infrastructure blueprint (logical arch, network arch, VM requirements, z/OS software)
- Sizing requirements for applications & components in scope



Exit Criteria for this Phase

- PopUp appliances created, health check completed successfully
- Delphix Virtualisation Engine & Masking Engine appliances created and health check completed successfully
- PopUp & Delphix appliances: User access for project team validated
- Setup & Prep Checklist completed



B4.

Data Migration Preparation (using Migration Server utility)

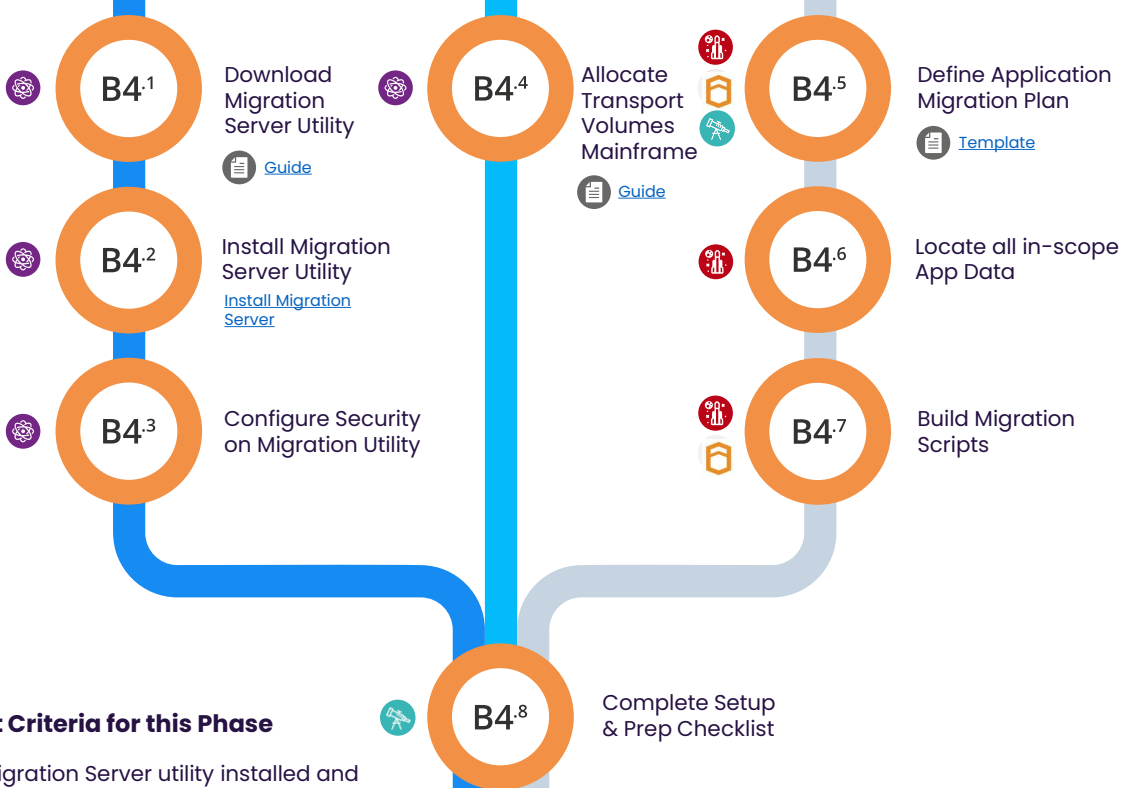
Entry Criteria for this Phase

- Full infrastructure blueprint (logical arch, network arch, VM requirements, z/OS software)
- Data migration strategy agreed with mainframe team
- List of data and application components to be virtualised (including sizing details)



People & Teams

- Project Sponsor
- Transformation Lead
- Architecture
- Linux Admin
- VM and/or Cloud
- Application
- Mainframe
- Network Admin
- PopUp



Exit Criteria for this Phase

- Migration Server utility installed and configured
- Migration Server security configured
- Transport volumes created
- All data in scope for virtualisation copied to transport volume. Data must be consistent i.e. time snapshot
- Migration Server utility smoke tested
- Setup & Prep Checklist completed



B5 Next Phase Unlocked

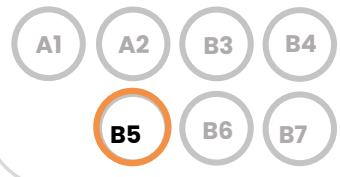
B4

B5.

PopUp & Delphix Configuration

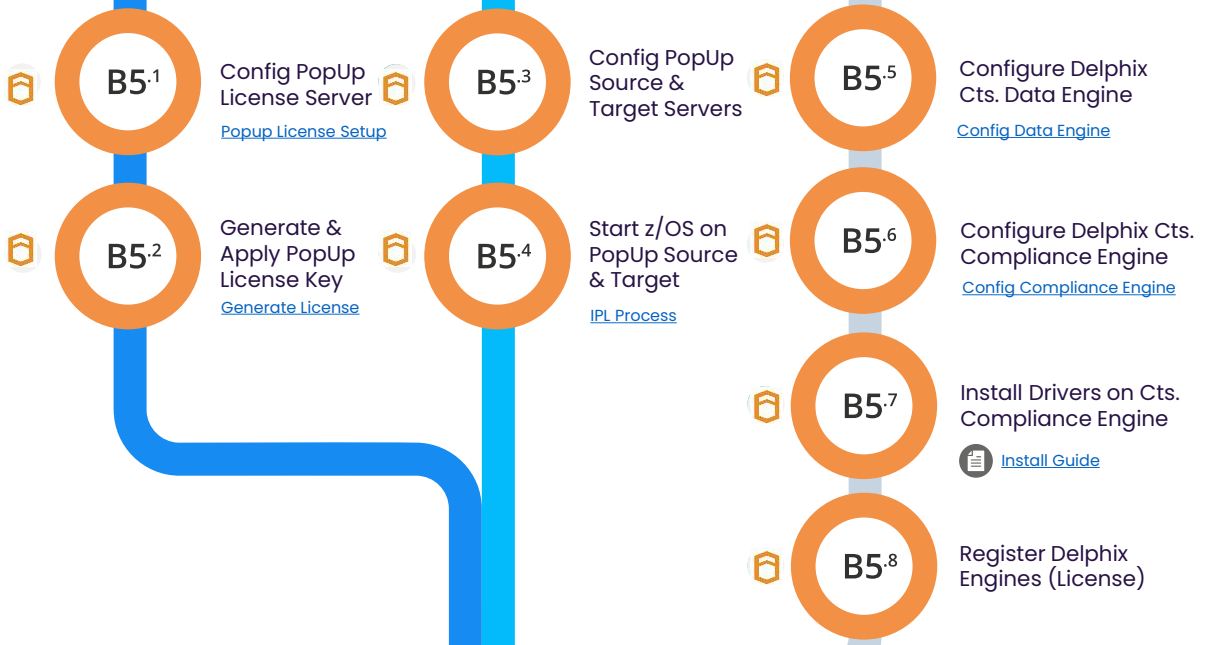
Entry Criteria for this Phase

- Exit criteria from Phase B3



People & Teams

- Project Sponsor
- Transformation Lead
- Architecture
- Linux Admin
- VM and/or Cloud
- Application
- Mainframe
- Network Admin
- PopUp



Exit Criteria for this Phase

- PopUp appliances configured, license keys applied
- Delphix Continuous Data & Continuous Compliance Engine appliances configured, license keys applied



B6

Next Phase Unlocked

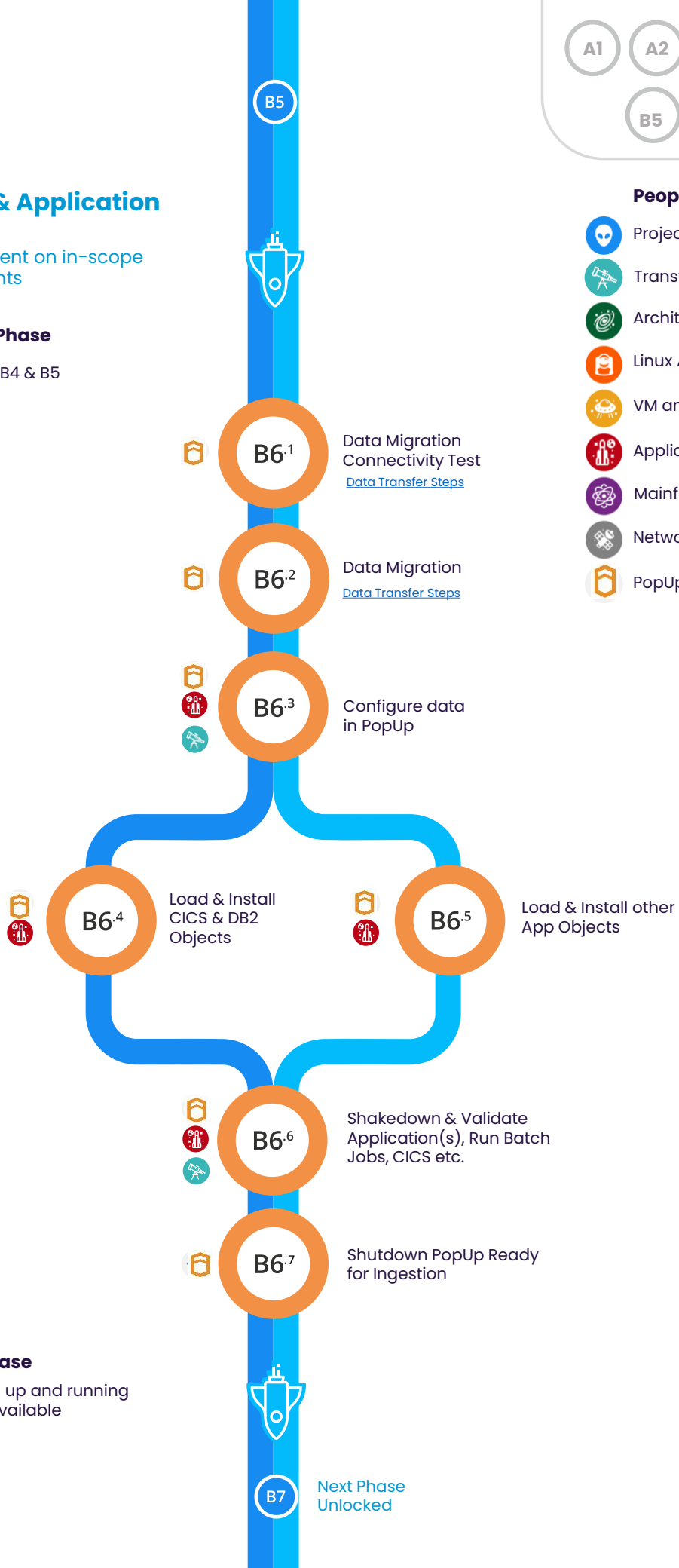
B6.

Data Transport & Application Build in PopUp

*Note: Heavily dependent on in-scope application components

Entry Criteria for this Phase

- Exit criteria from Phase B4 & B5



Exit Criteria for this Phase

- In-scope application(s) up and running in PopUp and/or data available
- Batch jobs completed

B7.

PopUp Virtualisation: create a "Gold Copy"

Entry Criteria for this Phase

- Exit criteria from Phase B6

B6



B7.1

Create "Environment"
in Delphix



[Guide](#)



Ingest PopUp into
Delphix Continuous
Data, Create "Gold
Copy"



B7.3

Provision PopUp Targets
(Virtual PopUps)



B7.4

Shakedown Test
Virtual PopUp



B7.5

Review Virtual
PopUps and Signoff



A1

A2

B3

B4

B5

B6

B7

People & Teams



Project Sponsor



Transformation Lead



Architecture



Linux Admin



VM and/or Cloud



Application



Mainframe



Network Admin



PopUp

Exit Criteria for this Phase

- One or more Virtual PopUps have been created on PopUp target infrastructure
- Virtual PopUp application use cases tested and validated
- Project success criteria met and signed off

