

# Delivery Manual

## PopUp Mainframe & FastTrack



# 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 an 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 solution
- Ensures the solution meets the client's 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 and the PopUp instances. Direction on what is required comes from the PopUp team



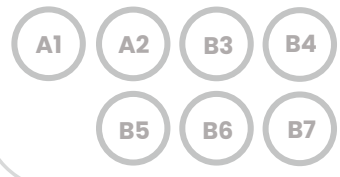
### CISO

- Team responsible for security policies are documented and adhered to



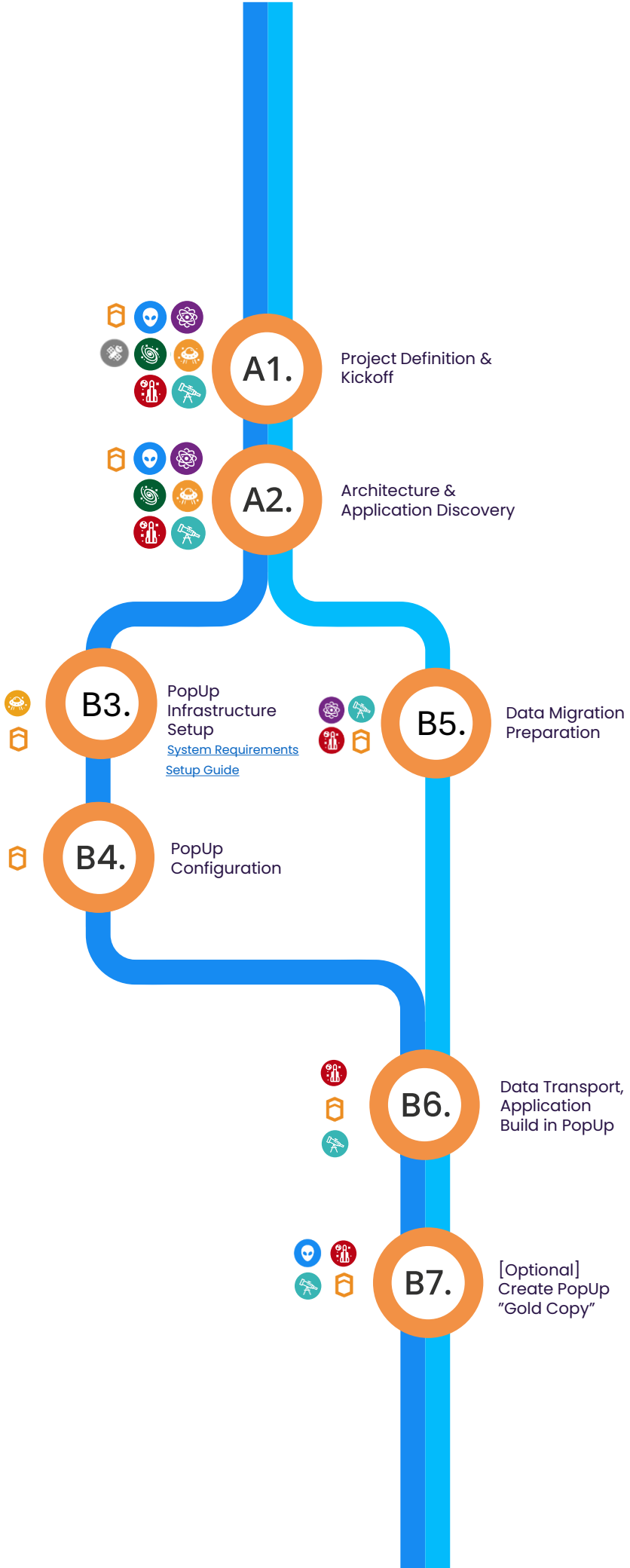
### PopUp Team

- The PopUp team delivers all the hands-on PopUp 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



**People & Teams**

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



# A1.

## Project Definition & Kickoff

### Entry Criteria for this Phase

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



A1.1

Project Kickoff Meeting



A1.2

Project Scope Workshop



A1.3

Create Use Cases, Validation Points, Project Progress Tracker

 [Use Cases & Validation Points Template](#)

 [Progress Tracker Template](#)



A1.4

Create Project Charter

 [Template](#)



A1.5

Project Charter Review & Signoff

A1

A2

B3

B4

B5

B6

B7

### People & Teams



Project Sponsor



Transformation Lead



Architecture Lead



Linux Admin



VM and/or Cloud



Application SME



Mainframe Sys PROG



Network Admin



PopUp Team

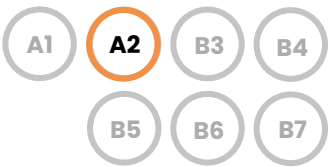
### Exit Criteria for this Phase

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

A2

Next Phase Unlocked

A2



# A2.

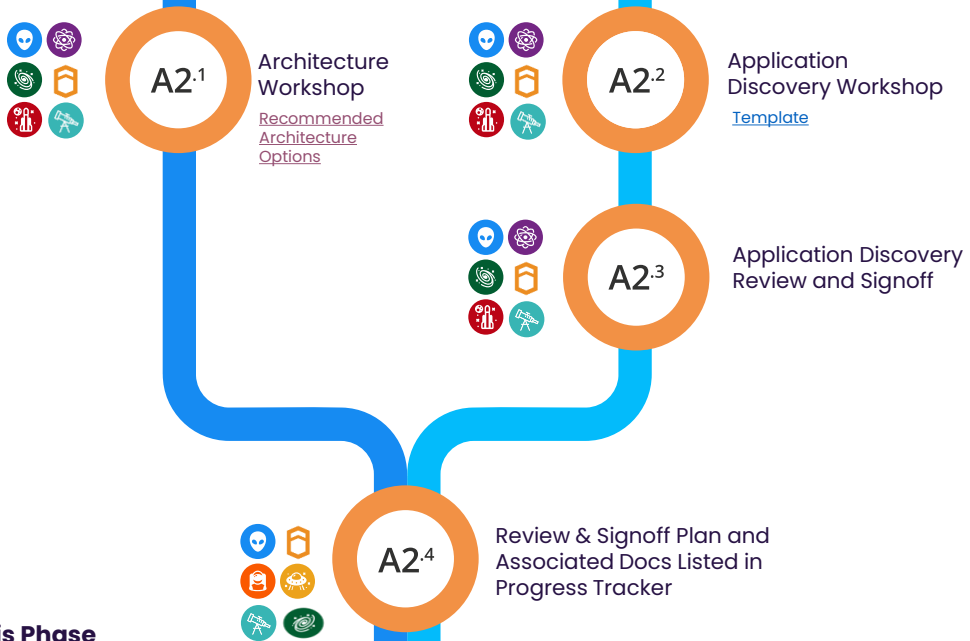
## Architecture & Application Discovery

### Entry Criteria for this Phase

- Project Charter
- Current systems architecture for applications in scope

### People & Teams

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



### 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

B3

Next Phase Unlocked

# B3

## PopUp 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 instance created, health check completed successfully
- PopUp: User access for project team validated
- Setup & Prep Checklist completed

A2



B3.1

Receive PopUp image  
[Setup Guide](#)



B3.2

Install the PopUp  
[Setup Guide](#)  
[System Requirements](#)



B3.3

Network & Firewall Setup  
[System Requirements](#)



B3.4

PopUp Storage Configuration (if required)  
[Configuration steps](#)



B3.5

Complete Setup & Prep Checklist

B4

Next Phase Unlocked

A1

A2

**B3**

B4

B5

B6

B7

### People & Teams



Project Sponsor



Transformation Lead



Architecture Lead



Linux Admin



VM and/or Cloud



Application SME



Mainframe Sys PROG



Network Admin



PopUp Team

# B4.

## PopUp & FastTrack Configuration

### Entry Criteria for this Phase

- Exit criteria from Phase B3

### Exit Criteria for this Phase

- PopUp VMs configured, license(s) applied, FastTrack installed

B3



B4<sup>1</sup>

Install & Config PopUp License Server

[License Server setup](#)



B4<sup>2</sup>

Generate & Apply PopUp License keys

[Generate license steps](#)



B4<sup>3</sup>

Install FastTrack package

[FastTrack guide](#)



B4<sup>4</sup>

IPL PopUp

[IPL steps](#)



B4<sup>5</sup>

Take FastTrack snapshot

[FastTrack guide](#)

B6

Next Phase Unlocked

A1

A2

B3

**B4**

B5

B6

B7

### People & Teams



Project Sponsor



Transformation Lead



Architecture Lead



Linux Admin



VM and/or Cloud



Application SME



Mainframe Sys PROG



Network Admin



PopUp Team

# B5.

## 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)

### 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



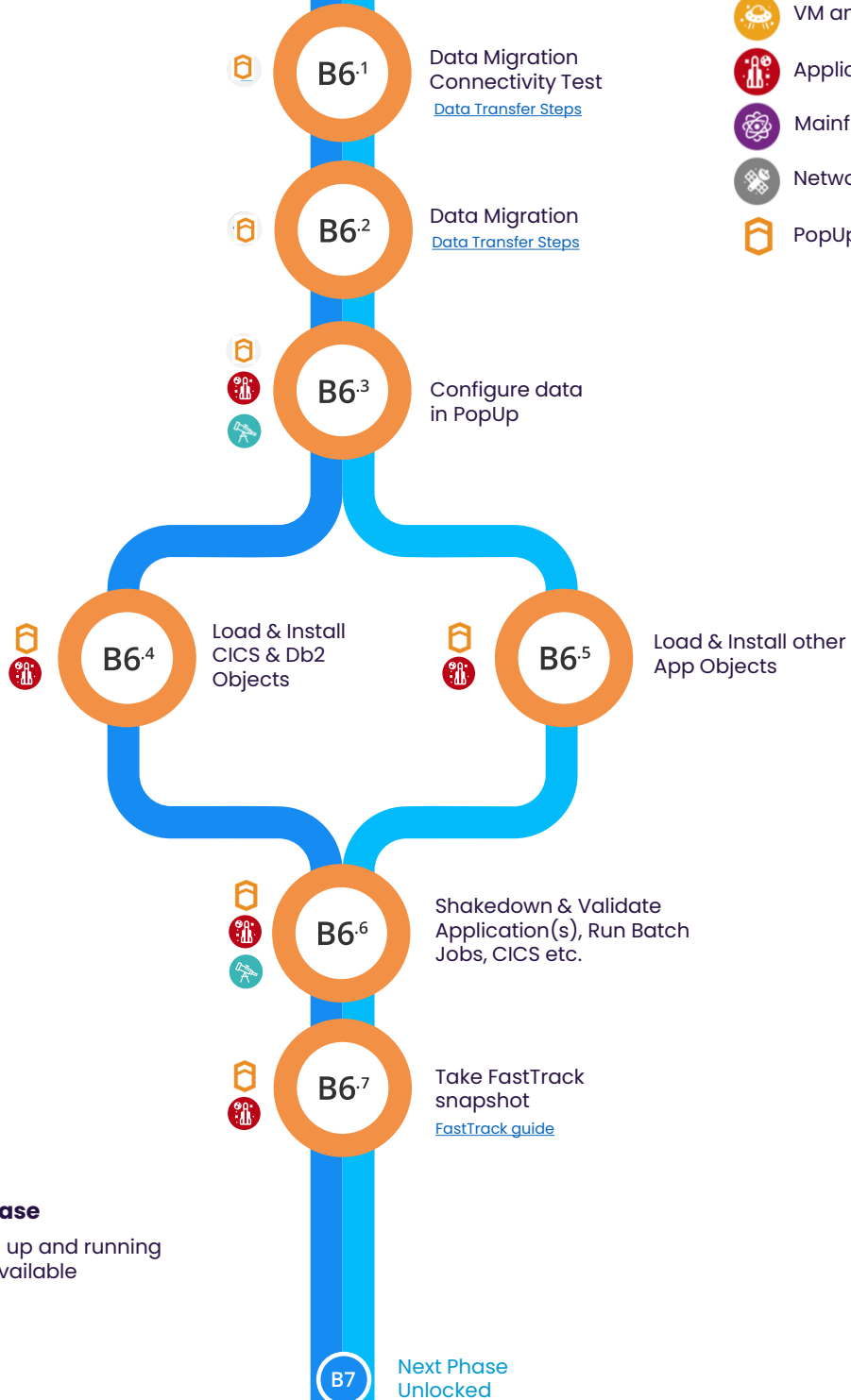
# B6.

## 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

B6

# B7. (optional)

## Create your PopUp "Gold Copy" for a specific use case

### Entry Criteria for this Phase

- Exit criteria from Phase B6



### People & Teams

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



B7.1

Create Gold copy PopUp for a specific use case / "slice" of your application



B7.2

Shakedown Test PopUp



B7.3

Take FastTrack snapshot (gold copy)

[FastTrack guide](#)



B7.4

(if required) Send snapshot to remote PopUp

[FastTrack guide](#)



B7.5

Review all PopUps and Signoff

### Exit Criteria for this Phase

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



