

White Paper

Portal Migration Strategy

Background

Many organisations are in their second and third phase of portal deployment and many of the leading portal technology software organisations are into fifth or sixth generations of evolution through development or acquisition - BEA ALUI (Plumtree), Microsoft Sharepoint, Vignette Portal (Epicentric), SAPPortal, IBM, Red Hat (JBoss), etc. with many challengers overtaking the established market leaders. So how does an enterprise organisation ensure it is making the best strategic investment?

Considerations

With the maturation of portal technology come the inevitable challenges; 'Should I remain on the existing Portal platform?' 'How do I migrate from one technology platform to another easily, quickly and cost effectively?' 'How do I avoid being in the same situation in the future when the technology evolves into the next generation?' And finally 'What is the business benefit in migrating?'

This White Paper

This white paper provides a high level guide to the questions that should be answered and the processes and tasks that should be undertaken in preparation for either an upgrade or migration of an enterprise portal.

Business Benefit

There are several strong business reasons for migrating from one portal technology platform to another. However, these must be balanced against the potential negative impact on the business during change.

Positive impact:

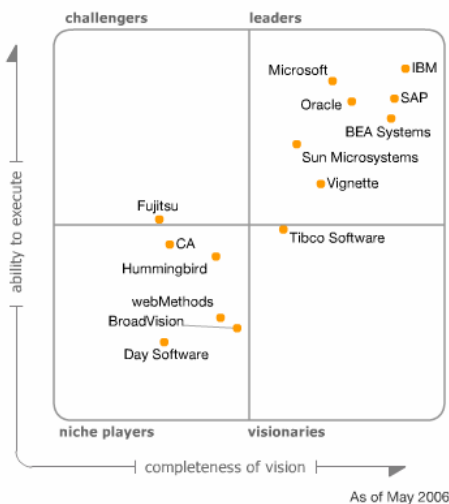
- The transition from one portal technology to another can allow a number of the current bespoke applications to be achieved using just native services that are provided as part of the new core platform.
- Using more native functionality provides the opportunity to simplify the platform, reducing development and maintenance costs.
- Less development provides an opportunity to review the number of resources required to support the portal platform.
- A new portal platform may open the way to a larger pool of market resources to support the technology also at a more economic rate.
- Importantly current industry standards (.net, java) can be adopted ensuring forward compatibility.
- A move to a new portal technology may provide an improved support model from the new software platform providers.

Negative impact:

- All change brings disruption and delay to a business critical environment. Therefore, the impact of changing portal platform must not be underestimated.
- Re-training of development and support resources is imperative.
- Infrastructure changes may be necessary.

However, the most liberating part of contemplating a strategic change of platform is that it provides the catalyst to review the existing system and allow innovation. The review allows the most successful elements of the existing system to be perpetuated and improved, poor performing elements to be redeveloped and redundant elements removed.

Magic Quadrant for Horizontal Portal Products, for 2006



Source: Gartner (May 2006)

Questions to ask ...

'What is the business benefit in migrating?'

'How do I migrate from one technology platform to another easily, quickly and cost effectively?'

'How do I avoid being in the same situation in the future when the technology evolves into the next generation?'

A Migration Approach

Abstracting the Portlet layer from the Portal technology platform

In the process of migration from one portal technology to another it is likely that some of the current portlets will not function in either an upgraded or migrated platform. Therefore it is necessary to review the current portfolio of portlets to understand the services and the value they provide to the business, how they function technically and to plan their upgrade and migration - to refresh.

'Refreshing' the portlets provides the opportunity to establish the business & technical criticality and usage of the current portlets. Additionally, the process of portlet refresh provides the chance to abstract the portlet layer from the host portal technology platform.

Abstracting the portlet layer has the benefits of:

- Removing the dependency on the current portal technology for any change in future portal platform strategy
- Minimise the risk in the migration by breaking the process into smaller sub projects
- Allowing several activities to be run in parallel and thus shortening the migration elapsed time
- Eliminate legacy code from the system.

The technology refresh of these portlets brings them all onto the same development platform simplifying and potentially lower the cost of their support and maintenance.

This initial simple process for cataloguing and refreshing these portlets is an invaluable process to any portal migration process.

Key Stages

To ensure a successful migration from an existing portal platform to a new technology Chapter26 recommends that the process be subdivided into the following key stages:

1. Abstract the Portlet development from the portal layer – Generate a portlet usage report and catalogue. From the report define a programme of portlet upgrades / refreshes
2. Start to prepare the content in the existing systems for migration
3. Select the new portal technology platform
4. Agree the new platforms reliability and performance characteristics (SLA)
5. Prepare the existing software infrastructure components for the migration (LDAP, AD, SSO, User & Group Management, etc)
6. Design and prepare the infrastructure for migration
7. Ensure the support and maintenance processes and resources are in place for the new platform
8. Implement any required modifications to the user interface
9. Agree the programme of working for the further exploitation of the portal platform by existing applications and content

This process is proven by Chapter26. It ensures migration success and mitigates against future technology changes.

About Chapter26

Chapter26 is a Specialist Solutions Provider which design, implement & integrate collaborative business environments through the secure management of content. Chapter26 specialises in Enterprise Content Management, Portals and Systems Integration.

Migration Roadmap

