

Parallelspace Corporation Professional Services

Parallelspace PresPart™ Portal Co-existence and Migration Framework 1.0: Overview

Parallelspace Corporation Confidential

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INTRODUCTION

The Parallelspace PresPart Portal Migration and Co-existence Framework consists of a portal reference architecture, prescriptive guidance, migration processes, supporting tools, budget planners and best practices for version-to-version portal migrations as well as migrations from one vendor's portal platform to another. Both coexistence (turning on the new solution in parallel with the existing solution) and final migration (turning off the old solution) are supported.

A key concept of the reference architecture is a presentation part ("PresPart"), a platform-independent generalization of the intra-page elements that make up a portal web page. Microsoft Web Parts and Plumtree gadgets are vendor-specific examples of PresParts. PresParts are modeled as n-tier sub-applications that run within the portal platform and may or may not consume platform portal services and/or external data and application services.

The PresPart Portal Migration and Co-existence Framework includes PresPart ESP™, a three-dimensional complexity model for estimating portal migration effort based on a PresPart's use of:

- i) External data and application services. (External)
- ii) Portal platform services (Services)
- iii) User presentation components (Presentation)

The classification scheme includes a four-level complexity-based effort (CBE) scale for each of the ESP dimensions: External, Services and Presentation. Estimates of the effort and cost associated with the planning, building, testing and integration tasks associated with each CBE dimension can be included in the framework's budgeting model (a sample of which appears in the section Budgeting Using the PresPart Complexity-Based Effort (CBE) Approach).

PORTAL REFERENCE ARCHITECTURE

Part of the PresPart Portal Migration and Co-existence Framework, the Portal Reference Architecture (PRA) is a platform-independent architecture for thinking about and organizing the planning, building, testing and release of a migrated enterprise portal solution. The PRA starts a simplified view and then includes layers of increasing detail and complexity. The simplest view of a portal solution is a three-tier or N-tier enterprise application as depicted in Figure 1.

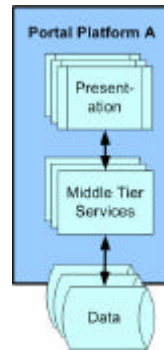


Figure 1. Portal Reference Architecture: Simplified View

The presentation tier communicates with a middle-tier portal services tier which in turn access configuration, content and other data in the Data tier. In the simplified view, all tiers logically run on the same portal platform. The PRA includes the operating system, development platform, portal database and portal platform software components. Physically, this architecture may be deployed on a single server in a small or medium size organization, a server farm in large organization or several server farms in a very large organization.

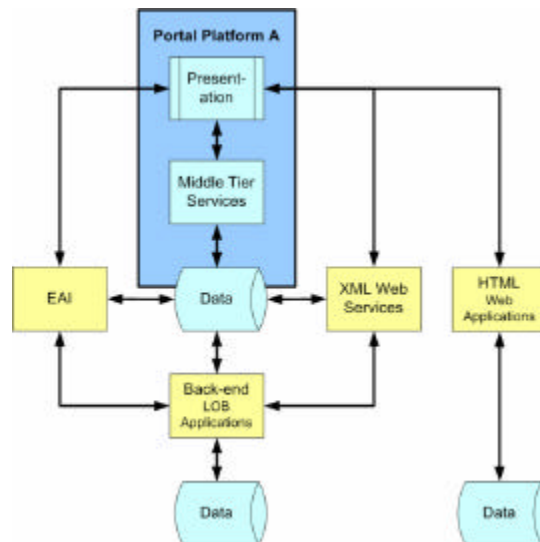


Figure 2. Portal Reference Architecture: External Application Services

It is rare that a portal solution to not include external integration with external applications and data. Figure 2 illustrates this next layer of complexity. PresParts continue to use internal portal services but in addition, some PresParts will communicate with external data and

applications using XML Web services, third-party enterprise application integration (EAI) solutions, or HTML presentation layers of external Web applications. The external applications may in turn access or aggregate additional line-of-business (LOB) applications and data.

During the coexistence phase of a portal migration project, the portal solution can be expected to consume different portal services from more than one portal platform at the same time. This may also be true in the final, post-migration deployment of the portal solution. This represents an additional level of complexity and is illustrated in Figure 3.

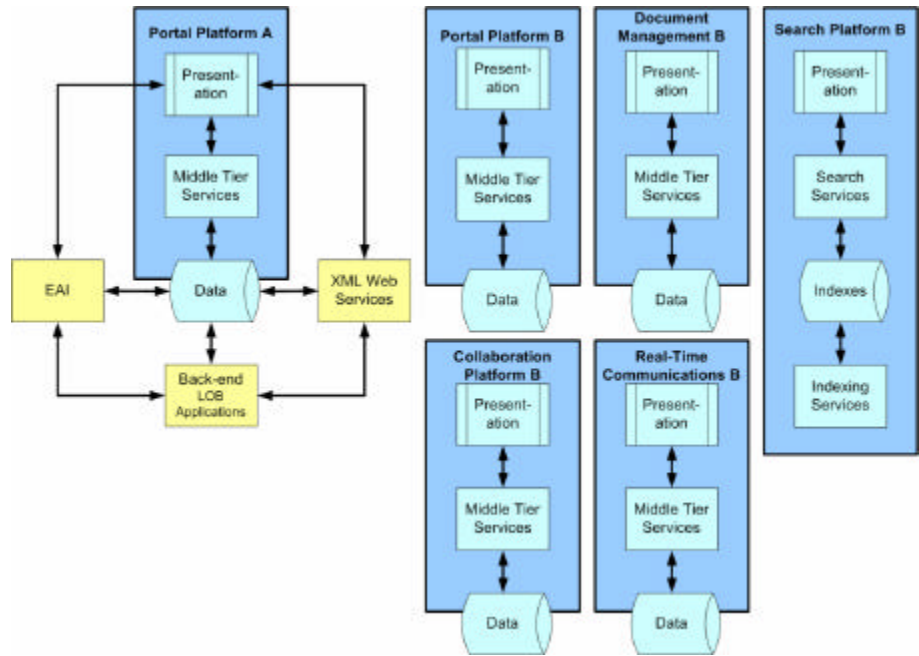


Figure 3. Portal Reference Architecture: Additional Portal Services

Many portal solutions also leverage the ability to incorporate user-specific profile information for direct presentation (user profile pages, personal sites), searching for people, and audience-based targeting of information (to display or not display specific PresParts and to filter which information appears within a specific PresPart). This additional, optional, complexity layer is shown in Figure 4.

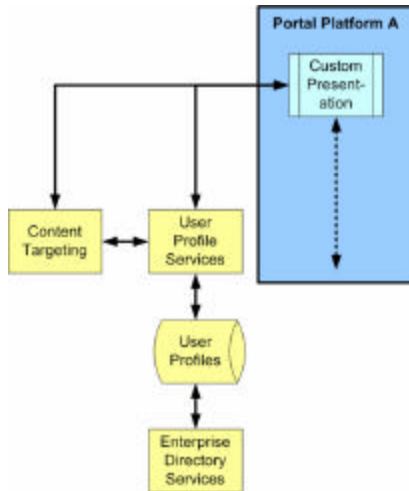


Figure 4. Portal Reference Architecture: User Profile and Personalization Services

To describe a portal solution at a more detail level, the PresPart Framework is used to describe, inventory, analyze, design, build and test individual (or similar groups of) PresParts.

PRESPART FRAMEWORK

Within the context of the PRA, a PresPart is a platform-independent generalization of the intra-page elements that make up a portal web page. Microsoft Web Parts and Plumtree gadgets are specific vendor examples of PresParts.

The PresPart Portal Migration and Co-existence Framework includes PresPart ESP™, a three-dimensional complexity-based classification scheme for categorizing PresParts based on a PresPart's use of:

- i) External data and application services. (External)
- ii) Portal platform services usage (Services)
- iii) User presentation components (Presentation)

The classification scheme includes a four-level complexity-based effort (CBE) scale for each of the ESP dimensions: External, Services and Presentation.

PresPart Reference Architecture

The PresPart Reference Architecture (PPRA) is an N-tier architecture for thinking about and organizing the PresParts that make up an enterprise portal solution. A fully-integrated (worst case) view of the PPRA appears in Figure 5.

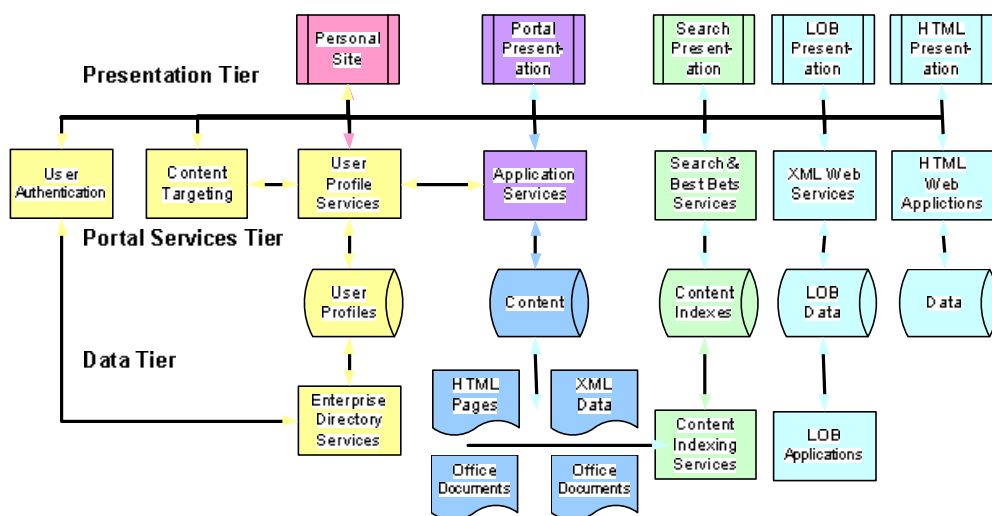


Figure 5. PresPart Reference Architecture: Fully Integrated View

Similar to the simplified view of the PRA, all tiers logically run on the same portal platform. The PRA includes the operating system, development platform, portal database and portal platform software components. In reality, the solution is more complex: some components, especially the portal services, data services and external application services and data may run in other environments. These environments may run on other operating systems and other (possibly multiple and multiple versions of) development environments as well as database platforms.

PresPart ESP Model

PresPart ESP™ is a three-dimensional complexity-based classification scheme for categorizing PresParts and estimating the migration costs of individual (or groups of similar)

PresParts). PresPart migration planning does not include external content migration or external application services migration. These are discussed later in this document.

The classification scheme includes a four-level complexity-based effort (CBE) scale for each of the ESP dimensions: External, Services and Presentation.

Estimates of the effort and cost associated with the planning, building, testing and integration tasks associated with each CBE dimension can be included in the framework's budgeting model and used for producing budget estimates for migrating a collection of PresParts from one vendor platform to another or from one product release to the next. A sample of the PresPart Budget Planner appears in the section Budgeting Using the PresPart Complexity-Based Effort (CBE) Approach.

ACMS (ACCELERATED CONTENT MIGRATION SERVICE) FOR MICROSOFT SHAREPOINT

In addition to migration of a portal solution's PresParts, migration of content from one portal platform to the new portal platform must also be planned for. The migrated content includes:

- Document content and other data
- Descriptive information (metadata) associated with the content
- Security settings
- Overall organization and structure (taxonomy)

Content migration planning naturally follows from PresPart migration planning. Once the inventory of PresParts has been created, the inventory of content to be migrated can be created.

ACMS uses a seven step process (illustrated in Figure 6) to analyze, plan and execute a content migration project.

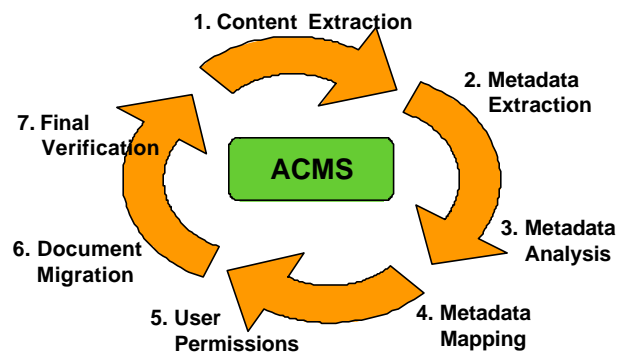


Figure 6. Parallelspace Accelerated Content Migration Service: Process Steps

The cost of a content migration project varies with the volume and complexity of the source to be migrated. This includes the number of documents and other data, associated descriptive information, security settings and the overall organization and structure of both the source and target environments.

Content Migration Execution

Parallelspace Content Objects (PCO) are standards-based file formats used to represent the structure and content of portal platform objects such as document libraries, site and content directories, best bests, contact information, etc.

Extractors extract content and associated data from a source store and persist it as a PCOs. The schema for the source PCO mirrors the schema, API or object model of the source objects in the source store. Injectors inject content and associated data from PCOs created using schema that is native to the target objects in the target store.

Transformers map native source PCO objects into native target PCO objects. This approach significantly reduces the complexity and increases the reliability of the migration of content from a source store to a target store.

The content migration needs to provide support for coexistence as well as the final migration scenarios.

EXTERNAL APPLICATION MIGRATION

A typical Web services PresPart includes a presentation component that is able to request and receive an XML SOAP message from a Web service. In this context of this example, the PresPart Portal Migration and Co-existence Framework includes migration of the presentation component and the SOAP requestor but not the Web service itself.

If the Web service also needs to be migrated to a new development and/or operating system platform, this is an example of an external application migration project that is in addition to (i) PresPart migration and (ii) content migration.

SUMMARY

Parallelspace PresPart™ Portal Migration and Co-existence Framework consists of a portal reference architecture, prescriptive guidance, migration processes, supporting tools, budget planners and best practices for migrating enterprise portal solutions from one vendor platform to another vendor's platform. Both coexistence ("turning on the new solution") and final migration ("turning off the old solution") are supported.

This Reference Architecture document provides a platform-independent architecture to inventory, access and plan a portal solution migration project.

A key concept of the reference architecture is a PresPart, a platform-independent generalization of the intra-page elements that make up a portal web page. Microsoft Web Parts and Plumtree gadgets are specific vendor examples of PresParts.

PresParts are modeled as n-tier sub-applications that run within the portal platform and may or may not consume platform portal services and/or external data and application services.

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The total cost of a portal solution migration includes PresPart migration plus one or both of the following:

- Content migration
- External application migration

The effort and cost of acquiring, configuring, testing and deploying the system hardware and software components and licenses is considered to be separate tasks associated with the portal solution migration but be included in the total project cost.

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