

Windows Server 2003 migration: Your three-phase action plan to reach the finish line

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Executive summary

July 14, 2015. This date marks the end of Microsoft's extended support for IT shops that are still running Microsoft® Windows Server 2003. You might have many reasons for delaying migration of your servers off this popular but soon-to-be-retired Windows operating system. Some of those reasons can make it difficult to see a clear path ahead. Yet postponing the inevitable adds mounting risks to your organization. In this white paper, you'll learn about Datalink's three-phase action plan to bring clarity, efficiency, and cost savings to what many consider to be an onerous but necessary migration task.

Windows Server 2003 and the big migration question

Many organizations are already familiar with the facts about Microsoft Windows Server 2003. They know extended support for the popular Windows OS ends after July 14, 2015. Many have even heard about the potential risks of waiting for their own server migrations. Yet according to some Microsoft estimates, there are still roughly eight million servers in the United States that continue to run Windows Server 2003.

Why the wait? The reasons for not migrating range from simple procrastination and cost worries to an IT labor shortage. In many cases, it may also be concern about potential incompatibility with legacy or custom applications. Will older, 32-bit applications built for Windows Server 2003 have the ability to operate on Windows Server 2008 or the newer Windows Server 2012 R2? In some cases, there could be many unknowns without a clear roadmap to follow. If certain applications can't be migrated, what's the answer? What's involved in replacing or updating them? Can the organization handle any downtime associated with a migration, upgrade, or replacement?

Despite these questions, continued migration delays also bring a series of risks. Analysts are very clear about these issues. With no further security patches or system updates after July 14, 2015, these servers will expose their respective companies to increasing risk. If your organization chooses to delay its own migration journey, such risks can include:

- **Greater vulnerability to attack.** Future virus or hacking attacks on this Windows OS will have no clear "fix" from Microsoft. While many IT teams could try on-the-fly fixes, they run the risk of realizing there is no fix at all. What's worse, they run the risk of having no viable ETA for when the current vulnerability can be addressed.
- **Non-compliance.** Whether your organization is highly regulated or has strict internal compliance controls, anyone with servers still on Windows Server 2003 past the Microsoft support deadline will find themselves non-compliant. Non-compliance brings its own issues, including a possibility of exclusion by coveted partners, embarrassing publicity, or even stock price impact. IT shops must demonstrate to a variety of stakeholders how they are maintaining compliance by keeping their companies' systems and data secure.
- **Increased costs.** With servers still running Windows Server 2003, organizations can expect ongoing support costs to increase as they battle aging server hardware and applications. Such applications may also need further internal support since many application vendors will also discontinue support, patches, and updates for versions still running on Windows Server 2003.

Windows Server 2003 and the big migration question (cont.)

- **Falling behind.** “If it ain’t broke, don’t fix it.” This philosophy permeates many organizations that have seen their Windows Server 2003 machines run relatively well since their inception over a decade ago. Yet as old applications continue on Windows Server 2003, IT teams risk further islands of legacy equipment in direct opposition to many growing goals toward modernization. Many companies are now embracing new and emerging technologies and IT architectures that will help them get ahead in business. From hybrid cloud to private cloud computing, the underpinnings of these new technologies tend to support 64-bit

computing, advanced virtualization, converged infrastructures, and the centralized use of shared resources such as shared compute / server, storage, and networking. Windows Server 2003 was not built to integrate with such emerging key technologies and the latest in cloud architectures. Remaining where you are can cause your legacy hardware and software to remain an aging island – perpetually disconnected and unable to successfully aid your company in getting ahead of the competition.

If only migration were easy

Unlike an in-place upgrade, moving from Windows Server 2003 requires full migration. And as you've seen from the prior section, there are no risk-free options. If only you could guarantee minimal hassle, fast turnaround, and cost containment.

While Datalink can't offer a magical transition for you, we can offer the next best things:

- Set of guiding principles to help ensure your migration success
- Three-phase action plan to guide you through your own migration project
- Turnkey upgrade program that pulls it all together

With a specialized migration practice and one or more global migrations currently underway on any given day, Datalink has developed unique expertise in speeding complex migrations and data center relocations. In the process, we've learned a few things about what to do and what to avoid.

Guiding principles for successful migration

Whether you need to migrate two, 20, 200, or 2,000 servers, it pays to follow some common rules. These rules comprise part of the Datalink philosophy used to ensure successful outcomes for our clients, whether we're working on mid- to large-scale migrations or more complex data center relocations. We recommend keeping these principles in mind as you plan your migrations:

- **Simplify and streamline prior to migration.** With the clock ticking on your Windows Server migration, many of you won't have the time to spend on this valuable step. While it's better to perform this activity prior to actual migration, taking the time to simplify and streamline your environment post-migration can still help manage costs and complexity. (If you

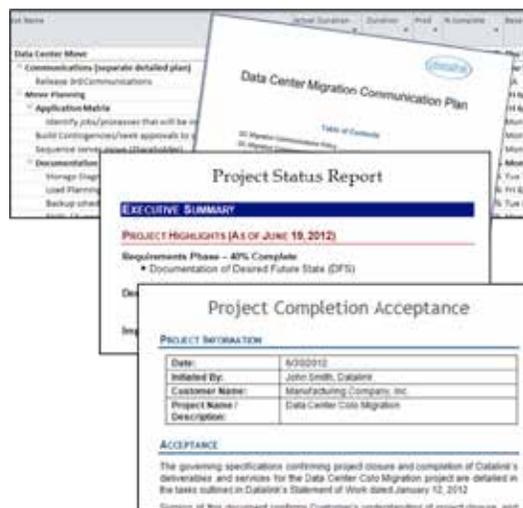
are fortunate enough to perform this prior to live migration, this step can also help reduce migration costs, risks, and overall migration time.)

- **Focus on migrating applications versus systems.** This may seem like semantics, but maintaining an application perspective is critical to understanding the potential impact of any migration on an organization's related business processes.
- **Leverage automation where viable.** Take advantage of automated tools for mapping application dependencies and verifying the current status of applications in your organization. We are familiar with the latest tools and how to use them for rapid discovery.
- **Always consider impacts to compliance, security, and BC / DR.** Your Windows Server 2003 migration strategy needs to keep in mind the impact on these three areas.
- **Capitalize on potential opportunities.** Again, this step is typically performed when there is sufficient time available prior to migration. It helps you understand your current cost constraints and current costs of ownership. It then suggests finding ways to migrate at the same time you are optimizing current IT operations. In some instances, this might involve a creative plan to migrate to new cloud-based cost models or to combine migration with other high-priority IT initiatives currently underway.

If only migration were easy (cont.)

- **Carefully manage the process.** We approach each migration project with a clear methodology and detailed program management protocol. Program management efforts toward Windows Server 2003 migration should include detailed milestones associated with project initiation, execution, and closure. Figure 1 offers a glimpse of the levels of program management details you might consider including.

Figure 1: Sample Program Management Deliverables



A three-phase action plan for migration success

For migration projects, we follow a very specific methodology, including detailed deliverables and milestones to ensure successful outcomes.

While the details of this methodology are beyond the scope of this paper, we can share some of the high-level points for any organization seeking to move forward on their own migration from Windows Server 2003. In general, we work in three phases:

- Phase 1: Discovery and analysis
- Phase 2: Planning
- Phase 3: Execution

Phase 1: Discovery and analysis

The first phase involves activities that define the current and future state of your servers running Windows Server 2003. Highlights of this phase include:

- Identifying all affected servers, applications supported on these servers, and application dependencies.
- Mapping applications and servers to related business processes.
- Determining the migration path for each server, including any remediation plans or creative alternatives to direct migration. (This includes application testing for supportable OS and determinations of upgradeability to Windows Server 2008 or Windows Server 2012.)
- Identifying the procurement needs required and recommended target OS (based on evaluation of various buy, build, or rent cost models).
- Developing a recommended high-level target infrastructure platform, high-level migration strategy, and TCO model.

If only migration were easy (cont.)

Phase 2: Planning

This second phase collects the findings and conclusions from the first phase, and drills down to develop detailed, specific migration plans. Highlights at this phase include:

- Defining migration group dependencies based on application needs and readiness. This includes the development of specific migration group design plans and application remediation plans.
- Staging new infrastructure. This includes detailed steps surrounding ordering and receiving new equipment as well as performing any necessary base configurations.
- Validating the new platform. Plans at this step confirm details about new configurations and connectivity options. This also includes detailed planning for contingencies that need to be in place prior to performing the actual migration.

Phase 3: Execution

The final phase is associated with activities before, during, and after actual migration. These include:

- Performing pre-migration exercises, including validation of migration contingency plans and any “go / no-go” decisions prior to the start of migration.
- Performing migration exercises. This is where migration plans, schedules, and timelines go into effect for local and remote resources. It’s also where any remediation is performed, if needed. This phase also involves ongoing monitoring and communication of progress and any risks.
- Performing post-migration exercises, including managing open issues, reviewing lessons learned, and disposing of retired gear.

Turnkey or DIY: Which migration path is right for you?

Datalink’s three-phase action plan offers highlights to get you started on the road to success with the Windows Server 2003 migration. But for many IT organizations, there just isn’t enough internal expertise, sufficient time, or internal IT resources to oversee this type of migration with the level of dedication and detail required.

For these types of projects, many Datalink clients look to our architects and engineers for their external expertise and streamlined assistance. Whether you need helpful guidance about key migration areas or a short-term extension to your own IT team, we can help where you need it most. Given the number of clients now facing the challenge of Windows Server 2003 migration, we’ve even developed a special program that does all the heavy lifting for you.

Datalink’s Turnkey Microsoft Windows Server 2003 Upgrade Program features a team of advanced migration experts, and incorporates much of the methodology and guiding principles identified in this paper. Our turnkey program is designed to speed your migration so that you can obtain quick, practical results. It’s also designed to reduce your risk through methodologies that have been used for thousands of successful server migrations. Use of our Turnkey Upgrade Program can even identify – and often deliver – cost savings over internal migration processes through the use of cost-effective options and innovative labor models.

If you’d like more details on our Turnkey Upgrade Program, please visit datalink.com/migration or contact Datalink at (800) 448-6314.

More about Datalink

A complete data center solutions and services provider for Fortune 500 and mid-tier enterprises, Datalink transforms data centers so they become more efficient, manageable, and responsive to changing business needs. Datalink helps leverage and protect storage, server, and network investments with a focus on long-term value, offering a full lifecycle of services, from consulting and design to implementation, management, and support. Datalink solutions span virtualization and consolidation, data storage and protection, advanced networks, and business continuity. Each delivers measureable performance gains and maximizes the business value of IT. To learn more about how Datalink can help your organization use today's evolving technologies to improve the overall efficiency of your data center and emerging cloud architecture, and deliver dramatic ROI to your organization, contact Datalink at (800) 448-6314 or visit www.datalink.com.

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