

7 KEYS TO A SUCCESSFUL **IBM i OS UPGRADE**



It's important to regularly upgrade the Operating System on the IBM i (iSeries or AS/400). This allows the development team to take advantage of the latest tools, and also keep the latest OS fixes in place, potentially preventing hardware or OS failures. These upgrades should be completed on a regular basis so that the system stays up to date and running the latest fixes. With proper planning and analysis, these upgrades should be reasonably straightforward. Here are seven topics to consider for your next upgrade.

1. PLAN, PLAN, AND PLAN SOME MORE

The most important thing to do is to create a documented plan for the upgrade. This includes the research before the upgrade, the tasks during the upgrade, and the support after the upgrade. Also, we like to try to plan for the 'oh-crap' moment as well as contingencies. Generally, we find the time allocated to an upgrade project is split 50/50 between planning the upgrade and executing the upgrade. For our projects, we like to measure twice three times, and cut only once.

2. LEVERAGE THE DOCUMENTATION FROM IBM

IBM, through the Knowledge Center, provides a wealth of information to help plan an OS upgrade. For every OS version released, IBM create a Preventative Services Planning Document that contains detailed information about the new OS. Also, IBM published this document to help walk through the planning process - “Checklist: IBM i software upgrade or replacement readiness”. This document contains specific tasks to perform before the upgrade.

3. PREREQUISITE PTFS

Most OS upgrades have prerequisite PTFS that need to be applied before the upgrade. Ideally, these should be applied well before the OS upgrade. This reduces the number of steps required for the OS upgrade and simplifies the upgrade weekend.

4. THIRD PARTY HARDWARE

The upgrade to the AS/400 Operating System will affect all peripherals attached to the system. All third party hardware systems will need to be reviewed to ensure they are compatible with the targeted release. These include peripherals like printers, RF devices, check writer, time entry devices and other data capture devices.

5. THIRD PARTY SOFTWARE

Like hardware, all the third party software packages need to be reviewed to validate these systems will function properly on the new OS. Some of these packages include TL Ashford, ROBOT, Gumbo, DBU, SEQUEL, Hawkeye, CoolSpool, and others. We find this is the most overlooked step in planning the upgrade. Double check with the vendor—make sure it'll work with the specific target version.

6. TEST, TEST, AND TEST SOME MORE

For large and complex implementations, we always like to test the upgrade before upgrading the production box. This can be done on separate IBM i hardware, or even within an LPAR.

7. SAVE EARLY, SAVE OFTEN

Before performing the upgrade on a production environment, we always create two backups, not one. Murphy's Law states, "What can go wrong, will go wrong." We don't want to be caught with only one backup and have it fail. Also, the backup must use the GoSave Option 21, putting the system into a restricted state.

BONUS #1

Warning! Not all license programs are included in the upgrade media. For example, the S/38 Utilities are not automatically included, and need to be specifically included in your order.

BONUS #2

Periodically, with a new release of the OS, IBM drops support with certain pieces of hardware. Again, check the Preventative Services Planning Document for details on this.

Upgrading the Operating System on the IBM i platform can be a daunting task. However, with proper planning and research these should be reasonably straightforward projects. The key is planning and adhering to the old adage: Prior proper planning prevents poor performance!

Are you still concerned about your upgrade? Give us a call and our IBM i team will be happy to help out with your questions.



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