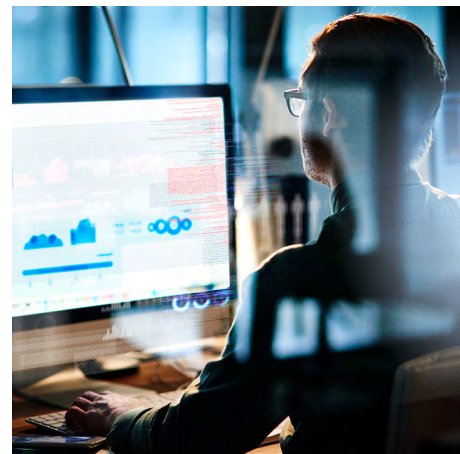# Insignia Financial Ltd.

Micro Focus Enterprise Server delivers successful off-mainframe migration within 6 months to realize 90% ongoing operational cost savings.

Who is Insignia Financial Ltd.?

Insignia Financial has been helping Australians secure their financial future since 1846. During that time, it has grown substantially to become one of the largest groups in the Australian financial services industry. Insignia Financial provides advisers and their clients with the following services: platforms for advisers, their clients, and hundreds of employers in Australia, advice services via its extensive network of financial advisers, and asset management products that are designed to suit any investor's needs.

> **"We welcome the 90 percent operational cost savings associated with running this application on a distributed platform instead of on the mainframe, but ultimately, we needed to choose the option that would give us the lowest business risk, and OpenText with Micro Focus Enterprise Server delivered this for us."**

MOHAMAD TAOUBE
Head of Technology
Insignia Financial Ltd.

Managing COBOL Mainframe Applications During a Time of Change

In May 2021 MLC became part of the Insignia Financial group. Some of MLC's core applications were historically mainframe-based but Insignia Financial had no mainframe infrastructure and as a new mainframe was not in the organisation's strategic direction, it was time for a rethink. As Robert Corran, Manager Engineer for Insignia, explains: "We had a couple of options at this point. We could stay on the existing mainframe which would buy us a little more time, though at a significant expense. We could introduce a new mainframe infrastructure within Insignia Financial but this would also have been a very expensive option for a limited number of mainframe-based applications, plus it could expose us to potential database connectivity issues between disparate environments. We decided to take an individual approach for each of the applications to decide between several exit paths, including data transfer to different solutions, and retiring or archiving old applications."

One application, calculating agents' commissions, has been in active use for close to 40 years. It is very batch-heavy, with more than 100 COBOL programs accessing multiple databases. It is part of a much larger application ecosystem with many downstream connections, and it was felt this would be a great

Insignia™ Financial

At a Glance

■ **Industry**
Finance

■ **Location**
Australia

■ **Challenge**
Migrate a batch-heavy application with many integration points from a mainframe to a distributed environment while minimizing business risk

■ **Products and Services**
Micro Focus Enterprise Server
Micro Focus Enterprise Developer
Micro Focus Enterprise Analyzer
Professional Services

■ **Success Highlights**
+ Lowest risk option to ensure business continuity
+ Efficient 6-month migration avoids penalties for continued mainframe use post bank separation
+ Success through effective teamwork between OpenText Professional Services and Insignia
+ 90% operational cost savings versus the alternatives
+ Significantly improved performance enhances user experience

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candidate to transform and deploy onto a much more cost-effective infrastructure. The team consulted with various system integrator partners and came across Micro Focus™ Enterprise Server by OpenText several times. Micro Focus Enterprise Server is designed to support organizations in their digital transformation journeys by reusing unique and business-critical mainframe-based core applications and data, and deploying these onto alternative infrastructures as part of a modernization journey.

OpenText Expertise and Micro Focus Enterprise Server Prove the Lowest Risk Option

With only nine months until the existing mainframe would become unavailable and extending access to it was going to be very complicated and expensive, the team was on a deadline. Engaging directly with OpenText™ Professional Services, the decision was made for an 'as is' migration to avoid negatively impacting any of the connected applications. "Leveraging Micro Focus Enterprise Server meant that we could seamlessly migrate from mainframe-based DB2 to DB2 running on a Linux environment," says Corran. "The external systems could then still connect without any changes. This was the deciding factor for us in the end, as it was the lowest risk option, with no downstream impact on business continuity."

A proof-of-concept (POC) followed a full landscape assessment. The POC focused on data migration and showed the team what could be achieved without any need for code refactoring. In addition to Micro Focus Enterprise

Server, the solution also included Micro Focus™ Enterprise Analyzer by OpenText as part of up-front code assessment and Micro Focus™ Enterprise Developer by OpenText for code compilation and to support unit testing and debugging.

It was then over to the combined Insignia and OpenText Professional Services team, and this is where the magic happened, according to Mohamad Taoube, Head of Technology at Insignia: "This was one of the best team efforts I have ever witnessed in my career. We were all working towards a clear, common goal, and pulling together in the same direction. There was no distinction between our team and the OpenText Professional Services engineers, just a joint effort. At one point, we needed some specific data integration support and the OpenText expert for this was on vacation. Regardless, he joined us on a call late at night from Hawaii and spent two hours working the issue to resolution with us. I was so impressed with the dedication of everyone involved."

Significantly Improved Performance and 90% Operational Cost Savings

During the warranty phase, only a couple of defects were highlighted which were addressed immediately. Considering the scale of the migration project this speaks volumes about the team's professional capabilities. It took just six months to migrate the application successfully to a Linux infrastructure, aligning with the organization's strategic direction, and avoiding significant additional costs in extending access to the existing mainframe.. Service to users was maintained throughout, with the only difference

being the faster performance achieved on the new hardware platform. "Because our mainframe environment was quite limited as it wasn't our primary infrastructure, it's a little tricky to compare performance between the two scenarios," comments Corran. "Still, we are pleased to report that the application performs up to three times better on Linux than it did on the mainframe, which is a definite benefit for our users."

Taoube concludes: "There is no doubt in my mind that this project was successful because of the people involved. Of course, we welcome the 90 percent operational cost savings associated with running this application on a distributed platform instead of on the mainframe, but ultimately, we needed to choose the option that would give us the lowest business risk, and OpenText with Micro Focus Enterprise Server delivered this for us."

Learn more at
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