opentext™

Professional Services
Content Server 16 Upgrade

10th April, 2019 | Darren Lambert & Lee Davey

opentext | Elite™

JOIN the Customer and Partner Loyalty Program and:

- **Earn points** for reference activities
- **Redeem for rewards** including Enterprise World pass, Professional & Learning Services
- **Raise your status** in your company and industry

"OpenText Elite™ has provided us with the opportunity to influence OpenText solution roadmaps, connect with other like-minded customers across the globe, and allow us to offer valuable learning and networking opportunities that would otherwise not be available to our staff."

Erin Gendron
Information Management Solutions

OXFORD
AN OMERS COMPANY

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opentext.com/elite

Agenda

- Upgrade with the experts

- Professional Services tips & tricks

- Testing and successfully going live

- Upgrade Assessment engagement overview

- Taking the initial steps?

- Wrap up and questions

Upgrade success: the bigger picture

- Business/technical drivers – uncovered by Upgrade Assessment?

- Are there any extension/solution enhancement opportunities here?

- What business benefits you are looking for?

- What will users get out of this upgrade?

- Is there a strategic Cloud vision for your business?

Why upgrade to Content Suite 16.2.8

- The new Smart UI - role based, responsive, widgets

- Connected Workspaces in Content Server - new UI

- A path to Extended ECM & other solution enhancements opportunities

- Social collaboration

- Search enhancements

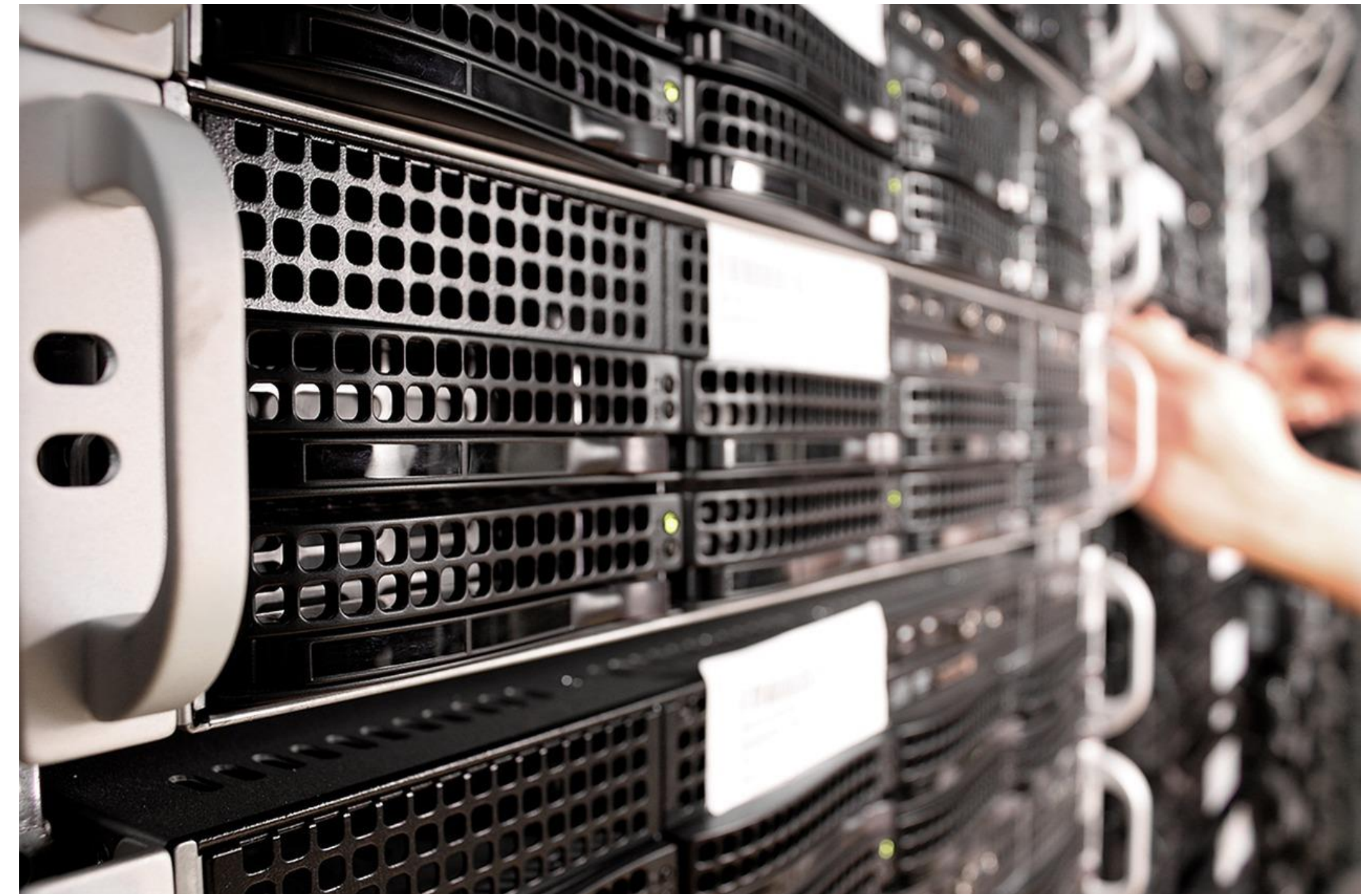- System Center

- Syndication

- & much more……..
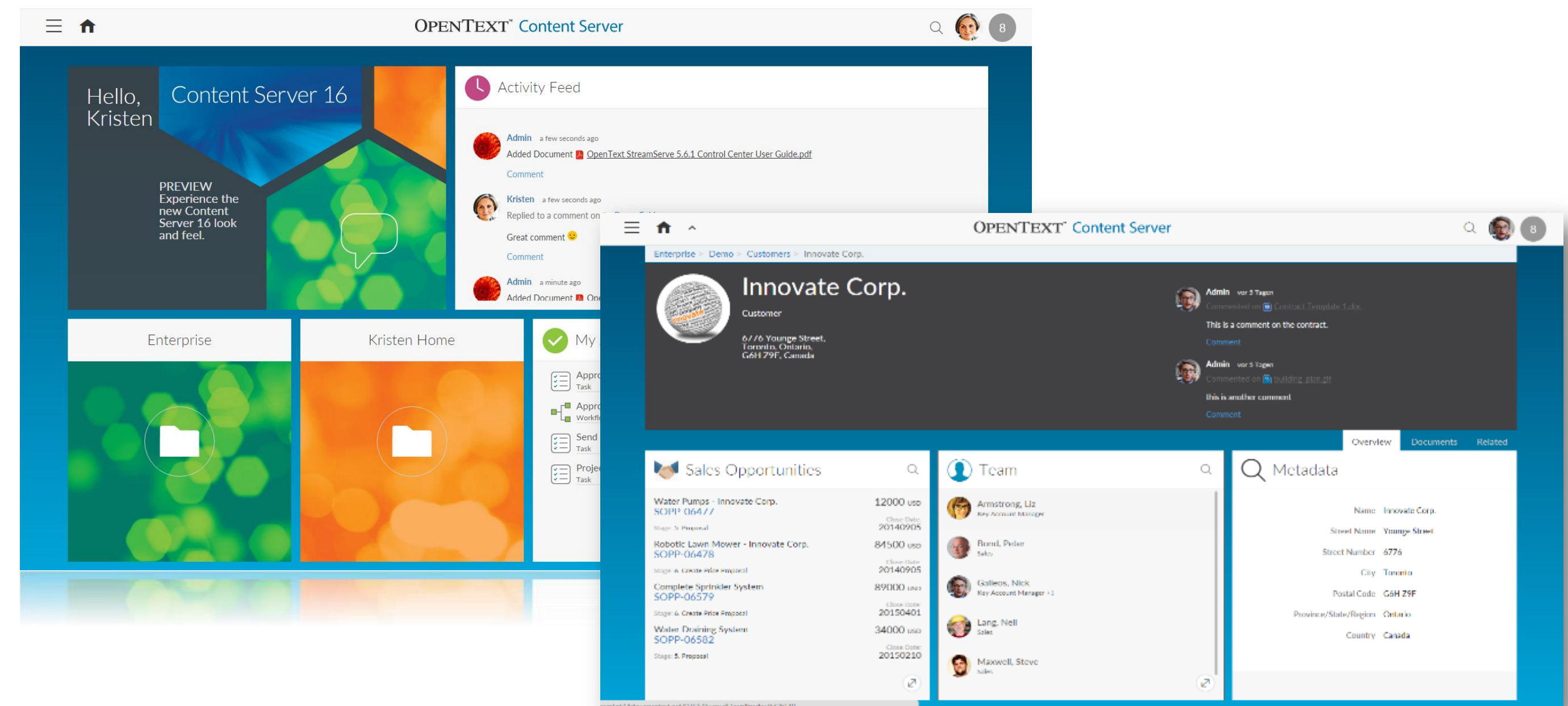
Things to consider about your upgrade

- Do we have a change management plan?

- What is our upgrade outage window?

- How many environments do we need to upgrade?

- How will we manage infrastructure requirements?

- How will we test this?

- Is there a desktop rollout required?

- Is there an opportunity to reduce TCO?

- Do we need Disaster Recovery?

Architecture considerations for your upgrade

- New versions of prerequisite server software

- Virtualization

- Capacity planning

- Extranet access

- High availability

- Disaster recovery

Approaches and options

Option	Considerations and Scenarios
Upgrades	• Do you have available people skills? • How quickly does the upgrade need to be done? • Are you upgrading from a recent version? • Are there any business process changes? • Do you want to continue to manage the system?
Migration	• Are you upgrading from an older version? • Is there an archive option for some content? • Do you want to continue to manage the system?
Journey to Cloud	• Do you want to avoid hardware purchase? • Do you want to manage the application? • Is there a fast, easy option for upgrades?

Professional Services Content Suite upgrade tips

Key upgrade tasks

- Indexing considerations, are there new opportunities?

- Performance, re-architecture, clean up, business challenge?
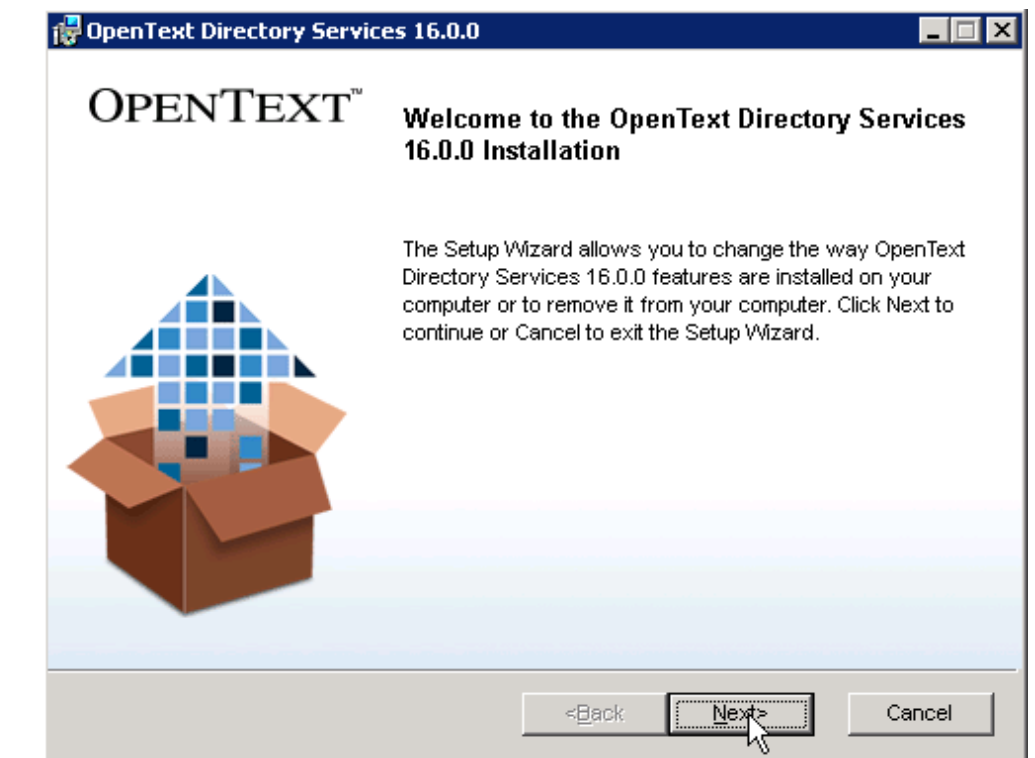
OTDS is now mandatory

- Admins should set aside time for learning
- User accounts must be migrated

Prepare your database

- Run Database Verification and resolve issues found
- Find and remove any custom indexes and triggers

System Center is now mandatory

- Updates, hot fixes, solution & environment maintenance, not just "Content Server"
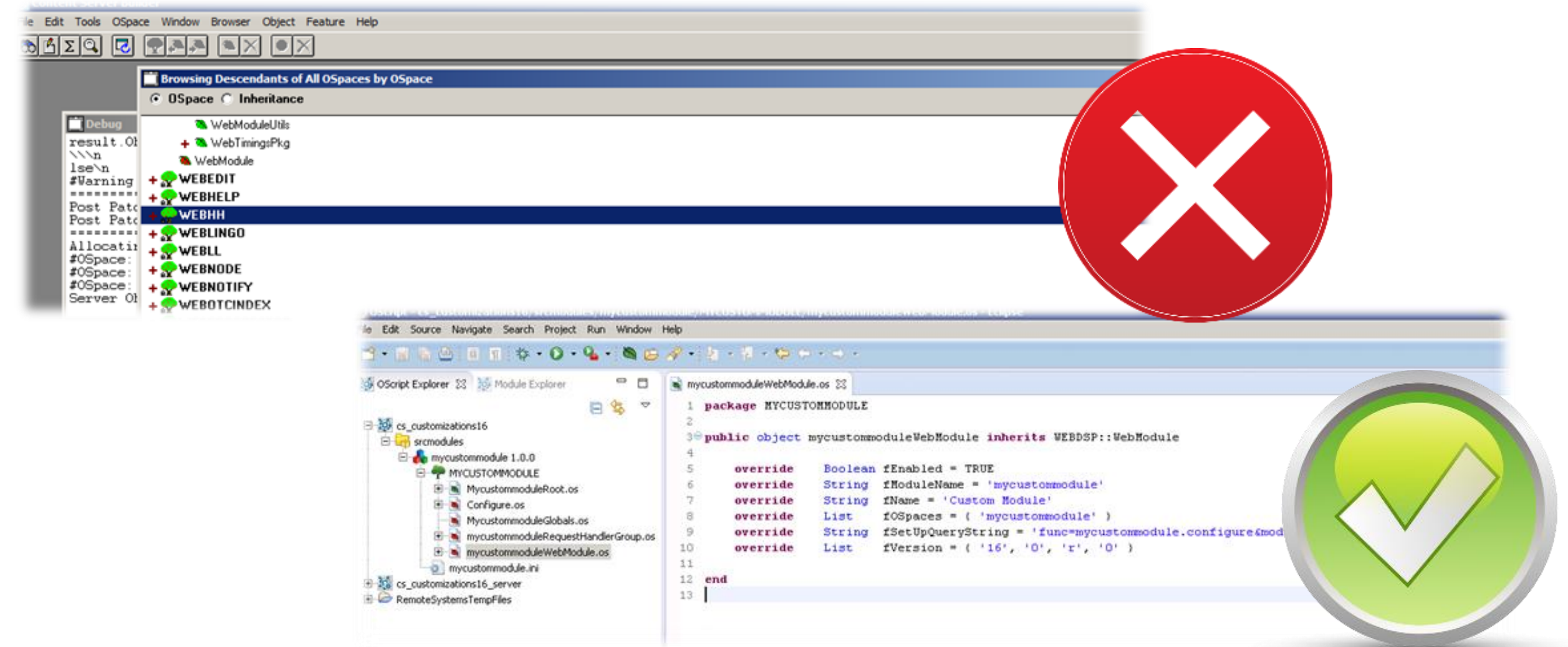
Upgrade considerations

LAPI

- No longer available in CS16.2.8
- Custom code **MUST** be converted to use a supported API

Custom Oscript modules

- Should be updated and recompiled
- Potential conversion to use WebReports

WebDAV

- No longer available in CS16.2.8

Good Bye!

LAPI & WebDAV
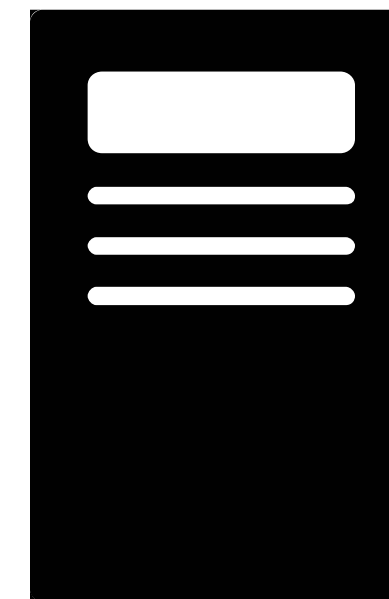
Building an upgrade environment

SUITE 16

- Requires a new install of Content Server

- Test your upgrade with a **complete copy of production**
  - Snapshot all data at the same point in time
  - Reconfigure the upgrade environment
  - Dry run(s)

- Isolate your upgrade environment
  - Ensure no cross talk with production
  - Block end user notifications
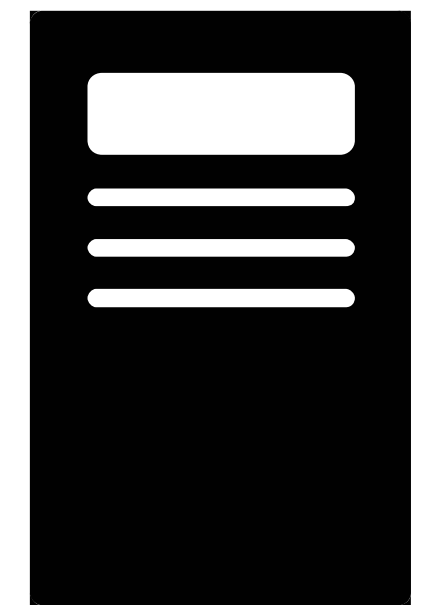
Testing and going live

OpenText upgrade test process

- Perform initial upgrade

- Undertake smoke tests

- Identify any issues which require resolution

- Update playbook with changes

- Repeat your upgrade test until process
  is "perfect"

- Accurately estimate your timings for outage window

Solution upgrade testing

Smoke tests (IT)

- Very narrow set of tests which confirm essential product functionality, especially as related to dependent subsystems

User acceptance testing (business)

- Does the business have an existing set of test scripts?
- How long will it take to execute?

Performance, penetration testing (optional)

- Do you have load testing software and test scripts?
- Under load, how does the upgraded environment compare to production baseline?
- What baselines do you have, are they required?

Additional environments

- What about additional environments?
  - Development
  - Test
  - Quality assurance
  - Preproduction

- Refresh using non-production configurations and data at the conclusion of final test run

- Thinking about GDPR and where data can reside?

OpenText Change Management

How can you ensure best go-live experience for users?

- Leverage the product
  - Create an upgrade workspace with user material
  - Configure an upgrade discussion forum
  - Define FAQs
  - Quick reference trifold available to all users on day one

- Select and train product champions within the business

- Introduce floor walkers for the first go-live week

- Present lunch and learn sessions to introduce new functionality

- Continual dialogue with stakeholders through project lifecycle

Benefits: in the words of our Customers

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SUITE 16

""The futuristic vision of OpenText Release 16 is what I call being ahead of the game. This release will enable us to collaborate, " secure and digitize our business processes.

Sonia Diaz-Sotomayor,
Senior Consultant, IT/IS
Bell Canada

SUITE 16

"OpenText Suite 16 and OpenText Cloud 16 are quantum leaps ahead of where we are now at 10.5. The look, feel and functionality are more sophisticated, and we can't wait to get there. We will have hybrid options, and the release will allow users to create their own experience. This will be amazing."

Angela Fares, Sr. Manager,
Records & Info Management
BNSF Railway

How can OpenText Professional Services start your journey?

opentext™

Professional Services
Upgrade Assessment Service

Who is it for?

- Customers who are concerned about their current version going into sustaining maintenance and the impacts on their business in this case

- Customers planning to upgrade their solution to the latest version

- Customers who are planning their long term strategy including a journey into the OpenText Cloud

- Customers that wish to use consultants with vast experience in projects of this nature

- Customers that wish to upgrade by using OpenText best practices

- Customers that wish to work with OpenText for success

What is it for?

- Analysis of your current system by highly experienced upgrade specialists

- Planning the upgrade of your critical solution, with success in mind and minimal disruptions

- Recommending best practice and the safest approaches
  - Remember 75% less support tickets when OT Professional Services deliver your project

- Work alongside in-house Service Management & IT/Support Teams

- Business owners and sponsors can input/participate
  - Attend workshops
  - Understand the upgrade process and the involvement of their business in this
  - Potentially gain an insight into new features afforded by the upgraded platform
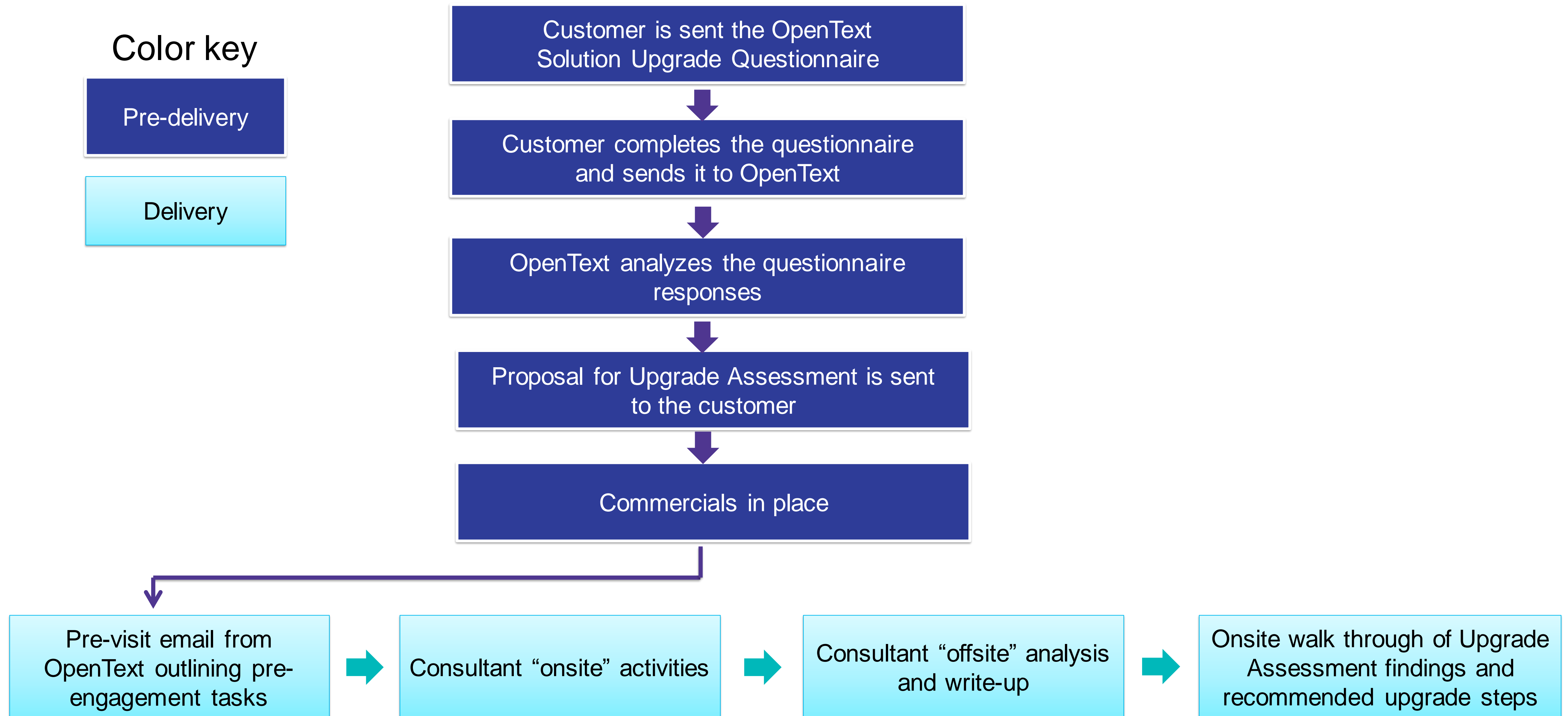
What do we do?

- Kick off workshop

- Analysis of the current solution, which includes:
  - Review and audit of the current setup
  - Safeguarding customization and integrations
  - Future capacity planning
  - Recommendations on target new architecture
  - Investigate cloud and hybrid options
  - Upgrade plan review
  - Upgrade approach and planning

- Upgrade proposal and presentation

- Single point of contact for Q&A to ensure the success of your upgrade!

Process overview

Color key

Pre-delivery

Delivery

Customer is sent the OpenText Solution Upgrade Questionnaire

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Customer completes the questionnaire and sends it to OpenText

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OpenText analyzes the questionnaire responses

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Proposal for Upgrade Assessment is sent to the customer

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Commercials in place

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Pre-visit email from OpenText outlining pre-engagement tasks → Consultant "onsite" activities → Consultant "offsite" analysis and write-up → Onsite walk through of Upgrade Assessment findings and recommended upgrade steps

Why work with OpenText?

Delivering EIM solutions and customer benefits

Reduced Risk	Rapid ROI	Reduced TCO	Simplified Operations
Expert resources Proven methodology Best practices	Business solutions & packages	Deployment flexibility	Ongoing management & optimization
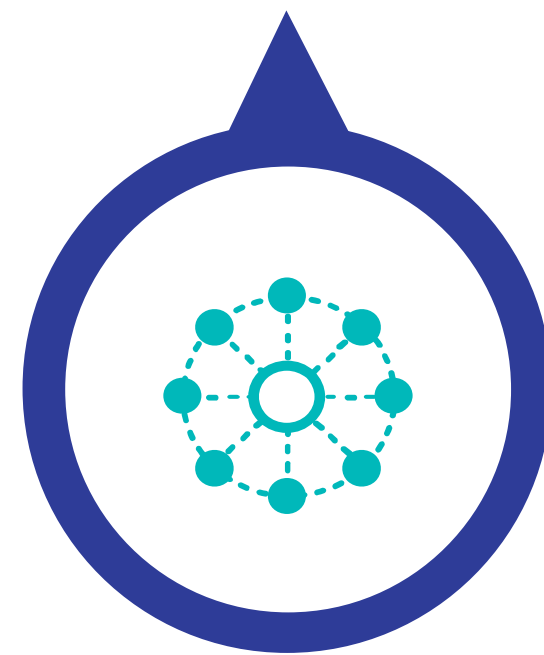
Let us manage your upgrade

De-risk upgrade

75% fewer customer support calls when OpenText Professional Services manages the upgrade

Tools and best practices

Upgrade Assessment
Customization and module review
Data migration cloud or on-premises

Local presence with global reach

1400+ ECM Consultants WW sharing project implementation experiences and best practices

I'm interested – what do I do?

- Go to www.opentext.com/campaigns/services-upgrade-opentext-software to register or contact your local OpenText Professional Services Solutions Principle or Account Executive

- Fill out a short questionnaire (less than 10 minutes)

- A proposal detailing the work to perform your upgrade assessment will be sent to you

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Thank you

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