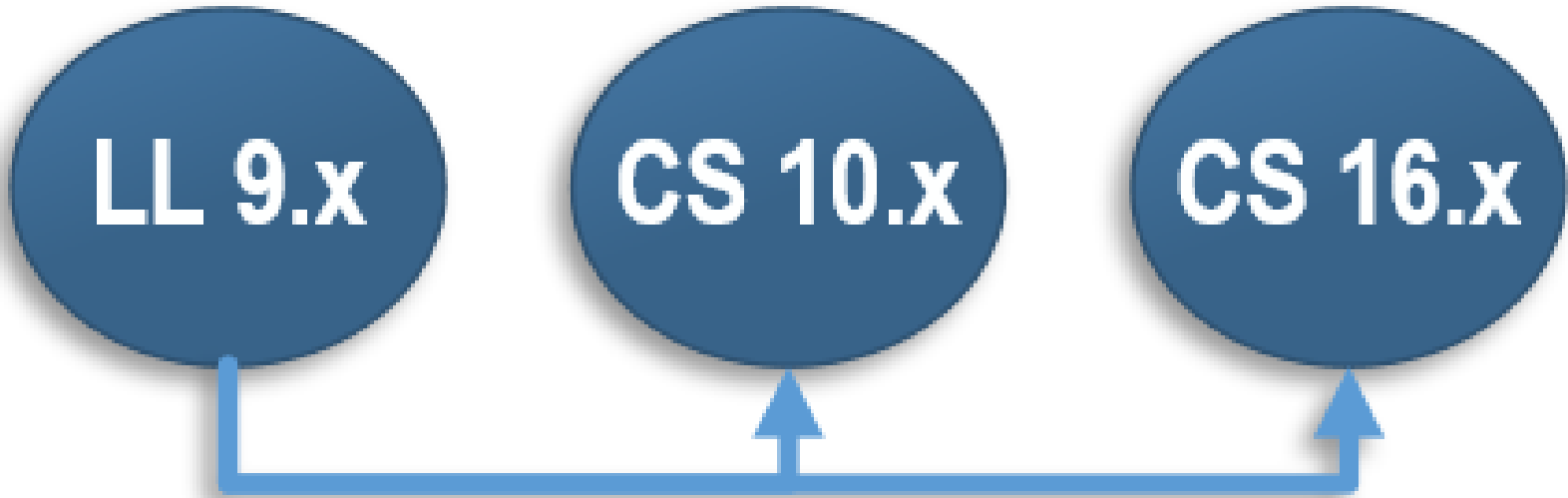




# Upgrade OpenText™ Content Server with Synergy's Upgrade Accelerator



**The Smart Way To Upgrade OpenText Livelink 9.7.X, Content Server 10.X  
With Zero Downtime, One Hop**

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- Synergy Introduction
- Upgrade Methodology Using Synergy Upgrade Accelerator
- Demo – Synergy Zero Downtime, One Hop Upgrade Method
- Q&A



**SYNERGY**

- 20 Years Experience Serving Global Customers
- Headquarters in San Diego, CA
- Key Executives and Engineers from OpenText and other ECM leaders.
- Distributed Staff & Partners throughout USA/Canada/Europe
- OpenText Technology Partner
- Microsoft Gold Partner
- Provider of more than 20 Content Server Products to Increase Usability & Adoption
- Consulting Services - Expertise in Upgrades, Migrations, Custom Module Development, Integration, Performance Tuning, Training, Support, Staff Augmentation, Premium Support Services
- Key Differentiators – Technical Expertise, Responsiveness & Value





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## Data Moving Solutions

- Upgrade Accelerator
- Replicator
- Data Manager
- Director
- Content Mover

## Workflow Solutions

- New Workflow Steps
- Workflow Map Printer
- Workflow Escalations
- Inbox Proxy
- LiveMail

## Security Solutions

- Enhanced Password
- Sendlinks
- Extranet Secure
- Next Generation Data Loss Prevention
  - Anomalous Activity Detection
  - Sensitive Content Detection & Management

## Storage Management

- EMC Centera Storage Connector
- EMC Elastic Cloud Storage (ECS)
- Storage Provider Migrator



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Is your company planning to upgrade to Content Server Suite 16?

1. Yes
2. No



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# Reasons to Use Upgrade Accelerator

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- Need to perform an upgrade with no interruptions to your users?
- Need to upgrade directly from older versions of Livelink or Content Server to the latest release in a single hop (no need to "hop" through multiple version upgrades)?
- Want to run old and new servers side by side, keeping the data in sync while testing, training and re-structuring as often as needed until you are ready to cut over to the new system?
- Want to migrate business units in your company sequentially, while the rest of the company is on the old system?
- Want to empower System Administrators to plan upgrades according to the business needs and Service Level Agreements
- Need to refresh hardware infrastructure for the new environment with no downtime?
- Need to consolidate Livelink or Content Servers into a single instance when upgrading to a new system?
- Need to select specific folders & content if all the content is not required to be migrated to the new platform?
- Want to re-structure Content Server during an upgrade if your business requirements have changed?
- Need to ensure business critical information including all associated metadata residing in legacy systems remains intact for a period of time after an upgrade?
- Need to change your server operating system e.g. Unix to Microsoft Windows or change your database vendor during the upgrade?
- Standard upgrade process either too complex or too slow to be practical for your situation?

# Standard Upgrade Steps



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- Perform UTF-8 conversion if using Latin-1 (non-trivial)
- If Livelink version < 9.7.1, upgrade to Livelink 9.7.1 (non-trivial)
- Build Content Server 16.X environment
- **Production outage begins**
- Take database snapshot and transfer to new system
- Image EFS and transfer to new system
- Copy search index (unless rebuilding)
- Update database
  - Point to new EFS location via SQL
  - Other changes etc.
- Perform upgrade
- Post-upgrade steps (rebuild or restore index, etc.)
- Test (if time remains)
- Change DNS to point to CS 16.X
- **Production outage ends**
- All steps should ideally happen twice for upgrade testing





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# Synergy Upgrade Steps

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- Build Content Server 16.X environment
- Install Upgrade Accelerator module in source and target and Content Server clusters
- Initialize replication
- Wait for systems to synchronize
- Test
- Change DNS to point to new CS 16.X environment
- From user perspective, upgrade will be instantaneous

**No production outage**

**Both systems can be live simultaneously**



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# Alternate *Cloned Approach* Upgrade Method

- Build duplicate 9.7.1 (source) environment
- Copy EFS, search index and database
- Initialize replication between duplicate environments
- Disable Upgrade Accelerator outbound traffic
- Perform upgrade to CS16.X (target) on duplicate system
- Enable replication traffic and changes will be synchronized
- Switch DNS entries

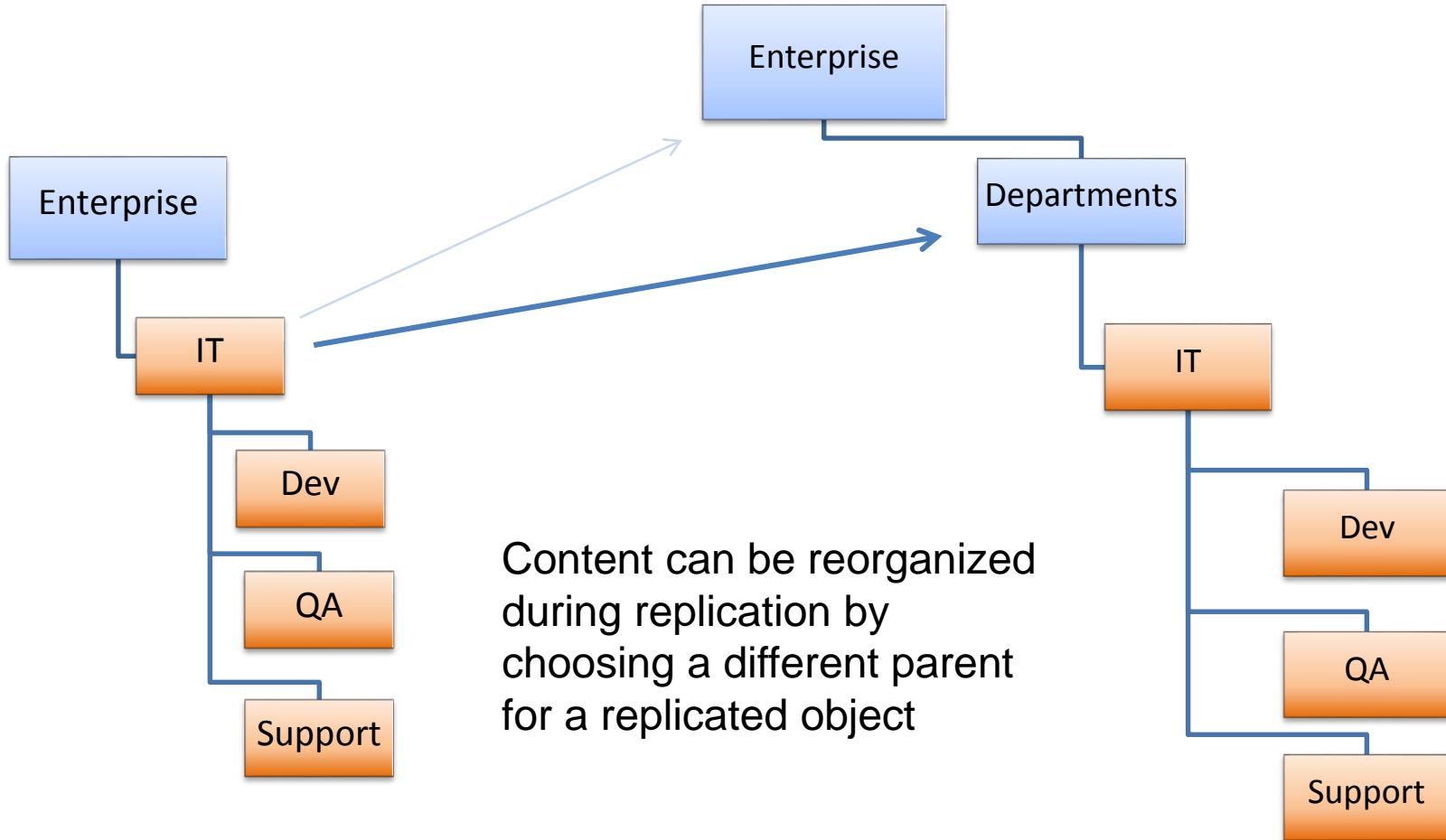


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Is a production outage a major barrier to your organization performing a Content Server upgrade?

1. Yes
2. No

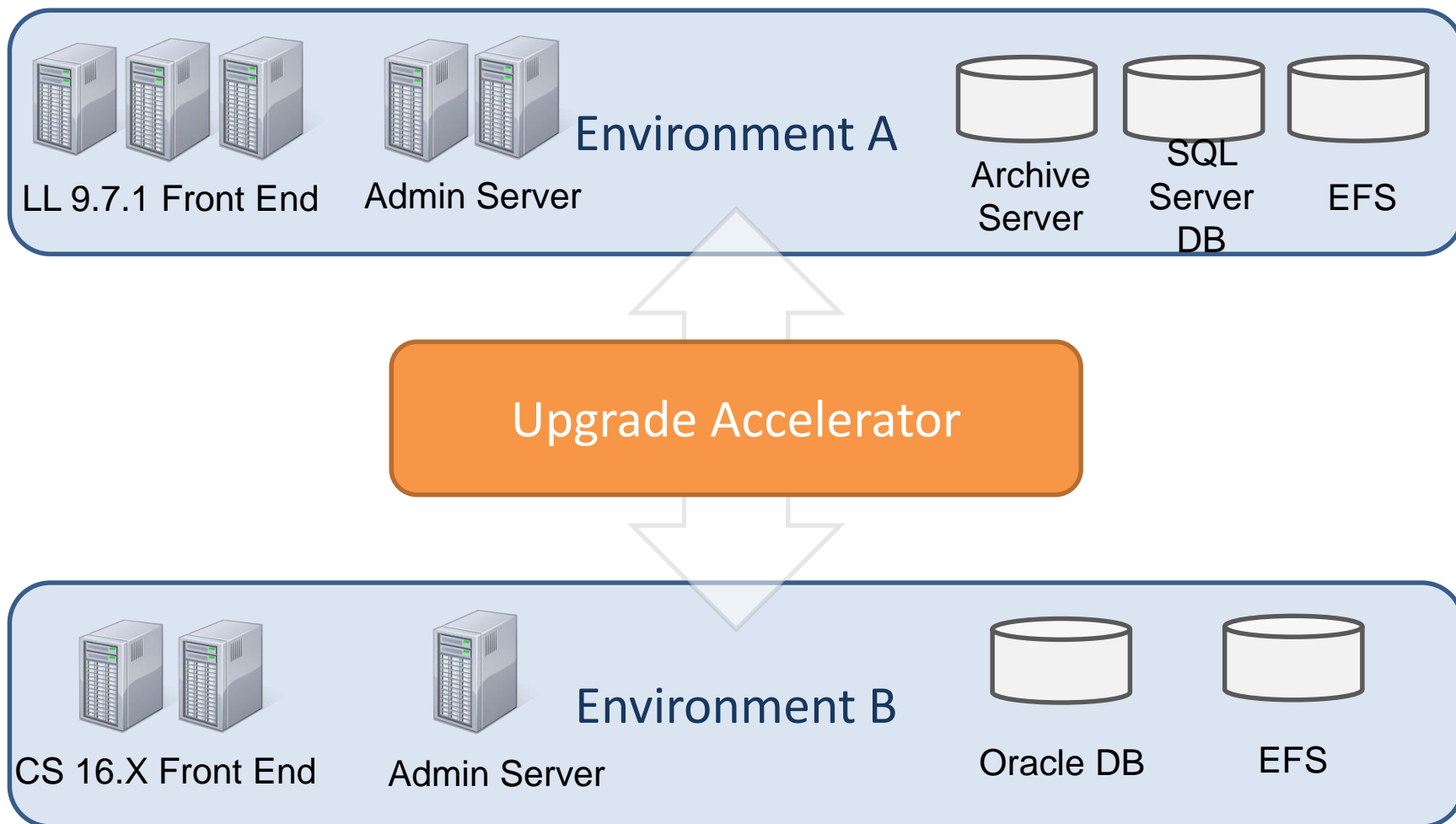
# Re-Parent Options for Migrations





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# Replication Scenario





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# Examples Of Supported Object Types

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- Support for basic object types and many optional modules:
  - Documents
  - Compound Documents
  - Folders
  - Categories/Attributes
  - Tasks
  - Projects
  - Communities of Practice
  - Workflows & Forms
  - Records Management
  - Transmittals
  - CAD Manager
  - Automatic Document Numbering
  - Electronic Signatures
  - Communities of Practice



- HTTP/HTTPS used for all communication
- No special firewall requirements
- Flexible options for file transfers allows Upgrade Accelerator to operate on unreliable or slow connections
  - Transfer file size is configurable
  - Metadata and file content is compressed before transfer
  - Compressed export files can be chunked up and transferred for increased reliability
- No network activity unless content changes



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