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Getting Started Guide

Moving from IBM FileNet to OpenText

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Are you ready to modernize?

It is time to modernize and improve your existing systems and technology investments to keep pace with the changing needs of your business and employees. Moving away from your existing legacy applications, such as IBM FileNet, is no small task. It is a significant decision that requires a strategic plan to manage potential risks, address daily challenges and build a stronger path forward.

You need a trusted partner to help you achieve digital agility with an integrated, end-to-end approach to unite, govern and leverage all your business information.

This Getting Started Guide will help you prepare for your transformation journey by:

- **Understanding the impact on your business and employees**
- **Identifying key priorities to develop a personalized modernization strategy**
- **Planning for key activities that will support a successful transition**

With the **OpenText Accelerated Modernization Program** (AMP), you will have the plan, support and flexibility to find the best solution to address your current daily challenges and provide the foundation to adapt and grow in the future.

Why move? Why now?

Your IT team has likely spent years customizing, managing and maintaining your existing system. And, some teams may also have grown accustomed to existing applications and maintaining the status quo.

This is not about undoing hard work or disregarding past technology investments. It is about moving to a modern infrastructure to meet today's evolving needs and building a stronger foundation for future business growth.

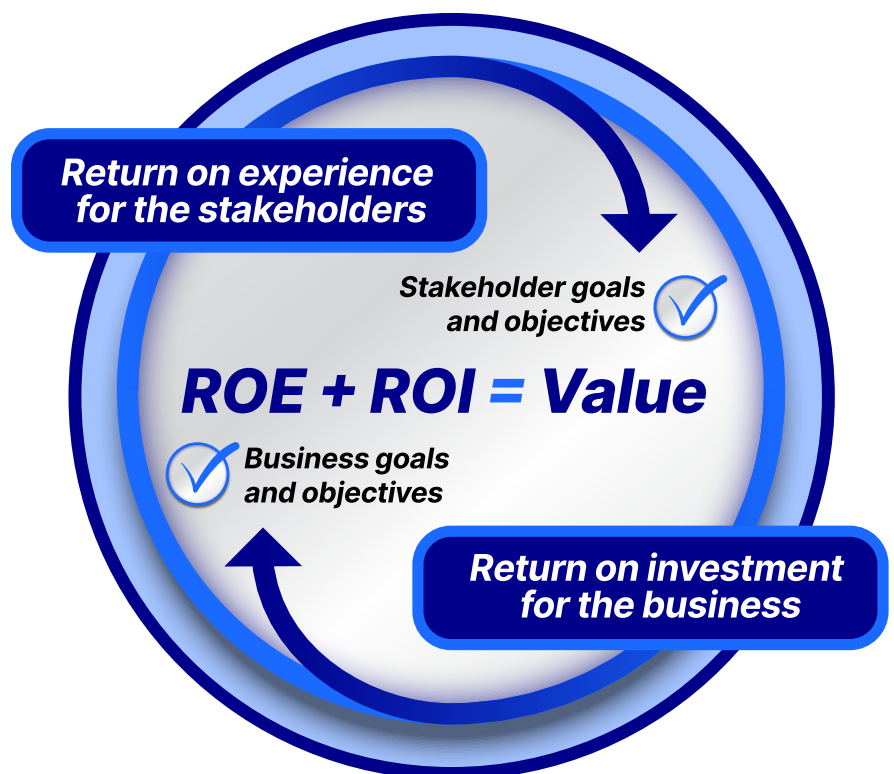### Six signs that it is time to modernize

Getting stakeholder buy-in to move from a legacy application is crucial. These six questions can help justify the move and explain why it needs to happen now.

1. **Are there opportunities or challenges your business is unable to address with existing applications?**
2. **Does your workforce have a growing need for solutions that enable new ways of working, such as remote work?**
3. **Are legacy applications causing lost productivity within your organization?**
4. **Is replacing or upgrading your existing applications too difficult or costly?**
5. **Would modern solutions simplify your complex business processes?**
6. **Is your organization considering SaaS-enabled or cloud-based solutions, now or in the future?**

If you answered "yes" to any of these questions, it is time to move away from legacy applications to more agile solutions that make sense for today's digital business demands.

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What's in it for your business?

Focus on the return on experience (ROE) and not just the return on investment (ROI) when purchasing new technologies. Improving daily employee experiences can impact ROI by reducing barriers and increasing productivity. That is why OpenText experts measure the value of implementing new technology or solutions through a value equation that considers both ROI and ROE.

Return on experience for the stakeholders

Stakeholder goals and objectives

ROE + ROI = Value

Business goals and objectives

Return on investment for the business

> The pain points your employees face while performing their daily tasks impact productivity, motivation and overall employee experiences.

As legacy applications, such as IBM FileNet, present increasing challenges, daily pain points become a source of frustration and friction, drastically impacting your business.

If your legacy applications are deeply integrated across the organization and within multiple departmental processes, negative experiences are amplified. It is crucial to get ahead of these issues and start thinking about the impact removing these challenges will have on your stakeholders, their Line-of-Business processes and daily tasks.

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Our approach to accelerated modernization

OpenText has helped many organizations modernize their Information Management (IM) infrastructure, improving business processes, boosting productivity and paving the way for future-proof solutions that evolve with the business.

The OpenText Accelerated Modernization Program (AMP) provides a phased approach to recharge your tired legacy applications and prepare for future business needs.

Phase 1	Assess and deploy
Phase 2	Modernize, adopt and manage
Phase 3	Decommission

Three-phase approach

Phase 1 – Assess and deploy: We work with you to complete a thorough assessment of your current state and how your organization is currently using IBM FileNet. Our experts then deliver a functional environment to address the unique needs of your business and existing applications for a glimpse of what is possible with an OpenText Cloud solution.

Phase 2 – Modernize, adopt and manage: OpenText helps you build a customized modernization plan. Our experts work with you to deploy a scalable enterprise solution supported by prescriptive services that accelerate time-to-value, maximize returns and offset internal resource costs for ongoing administration. We are in it for the long haul, working with you and your administrators to ensure the success of your modernization plan through Success Services, Learning Services and Managed Services.
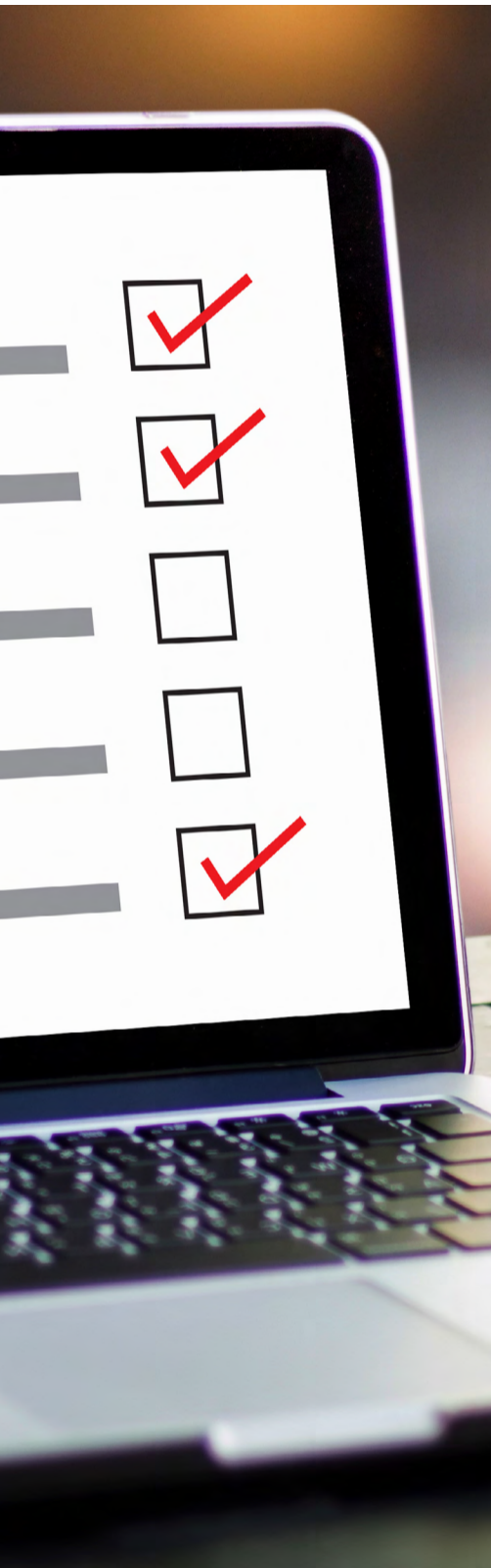
Phase 3 - Decommission: Our experts help you build a strategy to decommission IBM FileNet. Decommissioning may happen over multiple stages or you may need to create a supporting archiving plan. Whichever path is best for your business, OpenText understands that decommissioning your legacy application is a task that requires careful planning to minimize risk and disruption.

We do not recommend a rip and replace approach.

Why? It simply is not a realistic option due to the costs and risks to your business. A phased approach allows your organization to achieve iterative wins, demonstrating the value this transformation delivers to your business.

Why a phased approach?

OpenText experts work with you and your stakeholders to understand:

- **Your organization's unique business requirements**
- **How this project will impact multiple areas of your business**
- **How this move fits into your strategic initiatives**

A comprehensive plan based on use cases, pain points and potential impact and benefits, paired with strong business justification, will prepare stakeholders to think big. A methodical approach to each phase of the AMP ensures the steps taken align with the big picture, deliver an improved digital-first infrastructure agile enough to support complex business processes, and provide value as your business progresses through this transformation journey.

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Conducting a needs assessment

Having worked with many companies on modernization initiatives, OpenText understands that each business has unique needs and, therefore, needs a unique plan for executing. As a first step, your organization should do a basic needs assessment that includes a thorough analysis of your application's current state:

- ☑ **Which department(s) currently use IBM FileNet?**
- ☑ **How is it being used?**
- ☑ **In what business processes is IBM FileNet integrated?**
- ☑ **What type of documents are stored and managed within IBM FileNet?**
- ☑ **How many years has your business been using IBM FileNet?**
- ☑ **When did you last upgrade the IBM FileNet system, including any new integrated technologies?**
- ☑ **What is the current total number of users on your IBM FileNet system?**
- ☑ **What functionality in your IBM FileNet system does your business currently rely on?**
- ☑ **What functionality, if any, do you feel is currently missing from your IBM FileNet system?**
- ☑ **Are your employees satisfied with the current user experience of IBM FileNet?**

The following are some additional questions you will also need to consider with the help of an OpenText expert:

- ☑ **Do you need a plan for moving to the cloud?**
- ☑ **Will you need to do a full or partial migration of content and data from your existing system?**
- ☑ **When will you need to or want to retire your IBM FileNet system?**
- ☑ **Will you need any integrations or customizations to better enable your existing or desired business processes?**
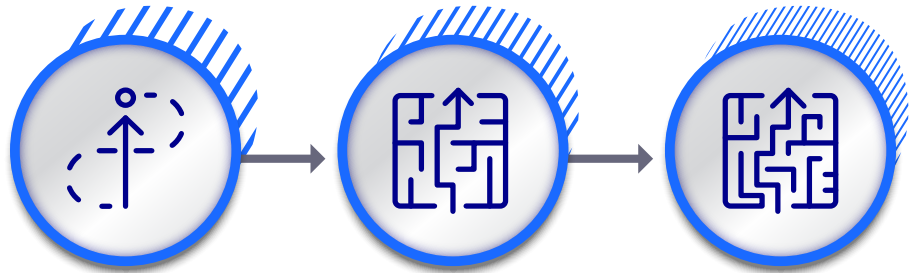
TIP / Complete an internal survey

OpenText recommends starting by surveying employees on how they are using your legacy application to capture:

- **Real-life use cases and challenges**
- **Employee satisfaction and experience with the system**
- **Areas where improvements will have the greatest impact**
- **How employees prefer to work to optimize productivity**

Note: As part of the OpenText Discovery Workshop process, our experts complete a thorough survey to better understand the current state of your legacy application(s) and potential improvements that would have the greatest impact and value for your business.

Planning your path to modernization

Based on your needs assessment, a thorough analysis of your current state and your desired outcomes, OpenText helps you create a proper decommissioning strategy for your IBM FileNet system. Decommissioning can be extremely complicated depending on how deeply embedded your existing system is within your organization and business processes.

You need a scalable IM solution. For some organizations, that also means adopting cloud-based solutions and implementing a cloud strategy. For others, it means finding solutions that enable a more flexible path to the cloud with room to transition gradually to a cloud-based platform. Whether your organization already has a cloud strategy, is ready to transition to cloud-based solutions or is just starting to think about the benefits of the cloud, OpenText can help you find the best path forward to achieving digital agility that:

- Unites information ecosystems

- Governs information securely

- Leverages information holistically

OpenText has a range of platforms and applications that enable the efficient capture, access, use and control of content. With OpenText™ Content Cloud, content can be automatically surfaced, connected and governed within the context of related business processes or transactions.

When it comes to modernization, consider your entire business ecosystem and the many complex processes that could be improved for better employee experiences and higher returns on your investments. Boosting the effectiveness of your existing systems is critical to success. OpenText solutions offer deep integrations with popular applications, such as Microsoft Office 365, Salesforce, SAP, ERP, HRIS and others.

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Our experts work with you to address these common challenges early in the process, allowing you to develop a project plan that works for your unique circumstances.

Need an on-premises solution?

While cloud-based solutions play a vital role in modernizing complex business processes, some organizations still require on-premises solutions. These organizations often have strict compliance requirements to meet, such as governance and archiving.

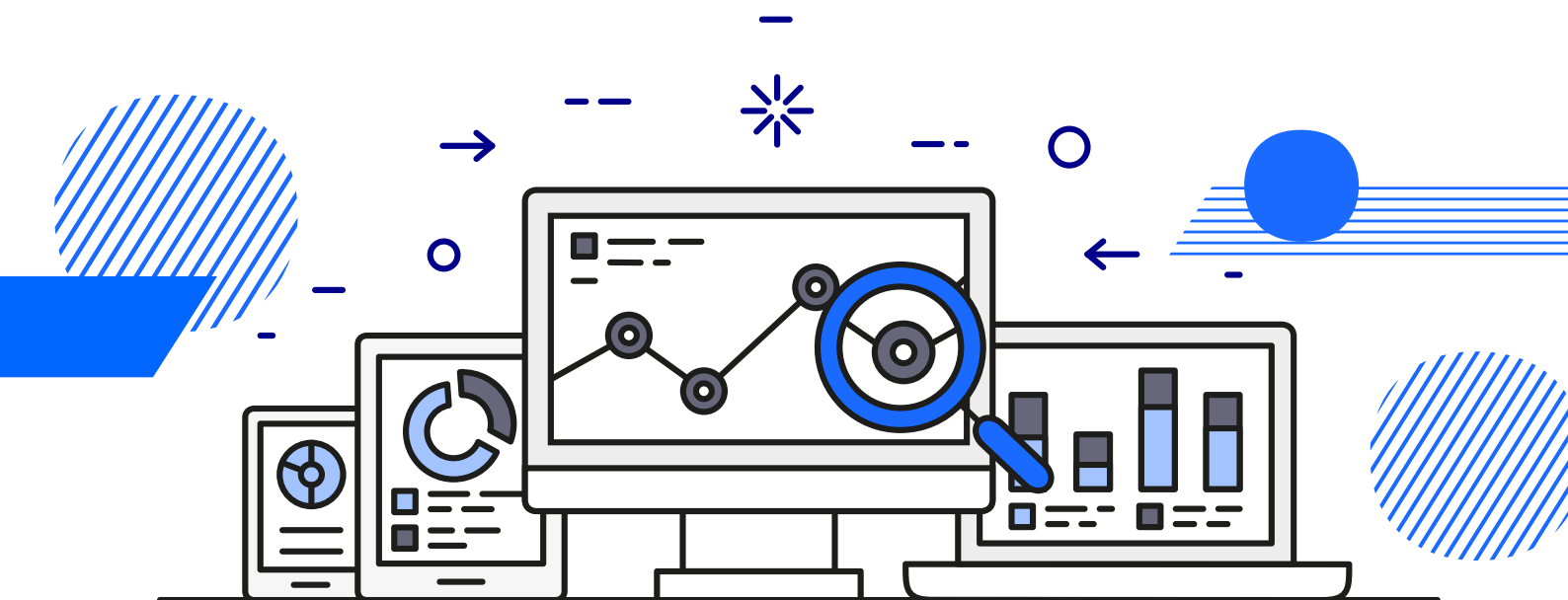### Preparing for common challenges

OpenText has worked with other FileNet customers, supporting them through their entire transformation journey. Based on our experience, some common challenges you need to keep in mind include:

- **Highly customized instances of legacy applications that are difficult to dissect**
- **Regulatory requirements impacting content management and storage**
- **Administrators of legacy applications no longer with the company**

Addressing potential gaps and risks

During this planning process and your actual transformation journey, there are potential gaps and risks that can impact the success of your project. Many common gaps and risks tie closely to employee experience, including:

- Lack of a success plan, key stakeholders, critical milestones and KPIs
- Lack of proper change management tactics to support employees as they learn a new system, work with new solutions and embed these new tools into daily tasks and departmental business processes
- Lack of communication and education to ensure the organization understands why you are making these changes, why it is important for the future of the business and what is in it for them

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A trusted partner – now and in the future

It's time to build a long-term strategy.

OpenText has done this before. We understand that a move like this can be a technical challenge and takes time, resources and thorough planning. We understand the risks and challenges and have worked with other customers just like you to navigate the complex transition from one platform to another.

With SaaS technology to support your evolution, OpenText is a trusted partner that helps organizations power modern work and prepare for the future of business by:

- **Increasing customer lifetime value**
- **Enhancing supplier performance**
- **Improving employee engagement**
- **Boosting partner effectiveness**

Surfacing content within the context of other enterprise applications, OpenText solutions connect your employees to the content they need, when and where they need it.

We help you reimagine what is possible.

Build your modernization plan through the OpenText AMP with the help of OpenText experts. We will be with you every step of the way to ensure your transformation journey is a success, helping you build a stronger path forward and future-proof your organization.

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: opentext.com.

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