



UltimateCare Catalog

Operate with confidence, perform with
excellence

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Introduction

UltimateCare is an Advanced Customer Support (ACS) subscription designed to help customers strategically plan, optimize, and sustain their OpenText environment. It delivers expert guidance, proven best practices, and proactive support to ensure smooth operations and accelerate time-to-value.

This catalog provides a comprehensive overview of the available UltimateCare packages, highlights their key benefits, and explains how customers can collaborate with OpenText experts to maximize solution performance and business impact.

What's included

As part of the annual subscription, customers can select up to four (4) service packages from this catalog. A dedicated Support Account Manager (SAM) will function as the customers strategic advisor and primary point of contact, ensuring seamless coordination and alignment of services to meet their business objectives.

Roles and responsibilities

The SAM will coordinate the delivery of services, conduct quarterly support reviews, and collaborate with the customer to identify and select packages that will enhance and optimize their OpenText software environment.

To ensure the success of these engagements, OpenText expects customers to actively participate in the planning process by identifying a single target environment and product, provide relevant technical documentation at least one week prior to the planning session, and make knowledgeable personnel available to the OpenText expert. This includes members of the solution, infrastructure, and operations teams who possess baseline product knowledge or training.

Package categories

UltimateCare packages are organized into four distinct categories, each designed to address specific customer needs across the lifecycle of their OpenText environment: System Readiness & Optimization, Planning & Risk Mitigation, Enhanced Support & Expert Access, and Critical Event Support.

Customers have the flexibility to mix and match up to four (4) packages from any of these categories, allowing them to tailor their support experience based on their unique priorities and operational goals.

- **System Readiness & Optimization**

Packages that assess and align your environment for optimal performance and reliability.

- **Planning & Risk Mitigation**

Packages that help you prepare for change and reduce operational risk.

- **Advanced Support & Expert Access**

Packages that provide direct access to specialized support and expertise.

- **Critical Event Support**

Packages designed to ensure success during key milestones.

System Readiness & Optimization

Packages that assess and align your environment for optimal performance and reliability.

Operational Readiness Assessment package

This package is designed to empower your team with the planning, policies, and foundational knowledge needed to effectively manage and maintain your OpenText solution once it has been implemented.

Through expert guidance and a structured engagement model, we will help you build a solid foundation for long-term operational success—ensuring your team is equipped, informed, and ready to support your solution from day one.

We are committed to delivering insights and guidance that empower your team and optimize your operations. Here is how we will work together:



- **Kickoff Planning Session (1 Hour)**

We'll align on your goals, scope, and timeline to ensure a smooth and focused engagement.

- **Technical Documentation Review**

Our experts will dive into the materials you provide to understand your current environment and identify key areas of opportunity.

- **Virtual Interviews with Key Stakeholders**

We'll connect with your team to gather firsthand insights and ensure our recommendations are tailored to your unique needs.

- **Comprehensive Technical Report**

You'll receive a detailed report covering:

- Infrastructure and system architecture
- Product usage insights and monitoring best practices
- Backup and recovery strategies
- Incident management recommendations

- **Up to 3 Days of Virtual Mentoring**

We'll walk you through our findings, answer questions, and provide actionable guidance to help your team move forward confidently.

- **Ongoing Support for Operational Readiness**

We're here to help you isolate issues, fine-tune processes, and ensure your systems are ready for success.

Environment Alignment Assessment package

This package helps customers streamline their OpenText environments by aligning production, pre-production, and test systems. By standardizing versions, patches, and configurations, teams can improve the accuracy of development and QA efforts, reduce deployment risks, and accelerate time-to-value for new changes.

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- **Planning & Discovery**

The engagement begins with a one-hour planning session to confirm key inputs and scheduling. Your assigned expert will then review customer-provided documentation—such as architecture, server, and network details—and assess your OpenText environments (Production, Development, and Test) to identify gaps, risks, and upgrade needs.

- **Analysis & Recommendations**

OpenText will deliver a summary report outlining key findings from the environment alignment review, along with clear, actionable recommendations to help bring your environments in line with OpenText best practices—enhancing performance, reliability, and long-term maintainability.

- **Comprehensive Report**

To ensure clarity and alignment, a four-hour review session will be hosted to walk through the report and discuss next steps with your team.

Health Check package

This package helps customers strengthen their disaster recovery and failover readiness by assessing current procedures and providing recommendations to strengthen their OpenText solution. With expert guidance, customers gain confidence in their ability to respond to unexpected disruptions, minimize downtime, and ensure business continuity.

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- **Planning & Discovery**

OpenText will conduct a one-hour planning session to align on key inputs and establish the review schedule. Following this, a technical expert will assess your OpenText solution to gain a clear understanding of its architecture, installation, and configuration. The review will focus on critical areas such as data integrity, in-use capabilities, system performance indicators from log files, and security configurations including OS-level permissions.

- **Analysis & Recommendations**

Based on the assessment, OpenText will deliver a tailored report that identifies potential failure points and system vulnerabilities before outages occur. The report will also highlight opportunities for proactive enhancements that improve stability, expand adoption, and increase overall solution value.

- **Review Session**

To ensure alignment and clarity, a review session of up to four hours will be scheduled to walk through the findings and recommendations with your team.

Planning & Risk Mitigation

Packages that help you prepare for change and reduce operational risk.

Upgrade Assessment package

This package helps customers confidently plan their upgrade to the latest version of an OpenText product. By working closely with OpenText specialists, customers develop a tailored upgrade strategy for one application and one server—leveraging proven best practices to minimize risk, reduce downtime, and ensure a smooth, successful transition.

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- **Strategic Planning & Assessment Session**

During this one-hour session, OpenText will:

- Collaborate with the customer on key information, timelines, and success criteria to ensure the upgrade meets their business and technical goals.
- Get the customer up to speed on the latest product versions and capabilities, highlighting features that can drive efficiency, security, and scalability.
- Confirm your desired upgrade version based on compatibility, business needs, and future roadmap alignment.

- **Tailored Upgrade Report**

OpenText will provide a high-level, tailored upgrade roadmap highlighting essential activities and key considerations specific to your environment and use cases.

- Infrastructure readiness for performance, scalability, and security
- Authentication and security strategy alignment
- Configuration and usage optimization
- Customizations, integrations, and UI impacts
- Tools and techniques for rapid issue isolation
- Testing and deployment best practices

- **Technical Report Read out**

OpenText will host a session of up to 4 hours to review the report, answer questions, and refine recommendations based on your feedback.

Disaster Recovery / Business Continuity Review package

This package helps customers strengthen their disaster recovery and failover readiness by reviewing existing procedures and recommending areas of improvement for their OpenText solution. With expert guidance, customers gain confidence in their ability to respond to unexpected disruptions, minimize downtime, and ensure business continuity.

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- **Planning & Discovery**

OpenText will host a one-hour planning session to align on scope, key inputs, and scheduling. This is followed by a collaborative workshop with your stakeholders to review current backup and restore procedures, assess relevant architecture and configurations, and clarify your recovery objectives—including Recovery Point Objective (RPO) and Recovery Time Objective (RTO). We'll also evaluate any existing plans and identify success criteria.

- **Analysis & Recommendations**

Based on the planning and discovery meetings, OpenText will deliver a tailored report comparing your current strategy against business requirements. The report will highlight gaps, recommend improvements, identify potential system vulnerabilities, and present opportunities to enhance reliability, adoption, and overall value.

- **Comprehensive Report**

To ensure clarity and alignment, we'll conduct a review session of up to four hours to walk through the report findings, answer questions, and define actionable next steps.

Quarterly Release and Patch Guidance package

This package helps customers stay current and secure by providing expert evaluation of quarterly OpenText product releases and patches. OpenText specialists recommend the most relevant mandatory and optional updates for the customer's solution and offer scheduled standby support during installation. This ensures a smooth implementation, minimizes disruption, and keeps systems optimized and compliant.

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- **Initial Planning Session (1 Hour)**

The engagement begins with a one-hour planning session to align on key inputs and establish the quarterly schedule.

- **Analysis & Recommendations**

Each quarter, your assigned technical expert will review officially released product updates and patches and deliver a detailed report outlining all available mandatory and optional patches relevant to your OpenText solution. This includes patch names, release dates, and links to support documentation covering bug fixes, security updates, and compliance enhancements.

The report will also highlight recommended patches, summarize the gap between your current patch level and the latest available, and propose an implementation sequence to ensure smooth adoption. A 30-minute review meeting will be scheduled to walk through the report and align on patching plans.

- **Scheduled Standby Support**

OpenText will provide up to 4 hours of scheduled standby support to assist with patch application and validation, giving you peace of mind and expert help when it matters most.

Advanced Support & Expert Access

Packages that provide direct access to specialized support and expertise.

2-Months Premium Support package (NSE, TAM, or ESM)

Working with a dedicated Premium Support expert gives you direct access to personalized, focused assistance—whether you’re navigating a critical issue or need expert guidance during a key project milestone. This focused support helps accelerate resolution, reduce risk, and keep your initiatives on track.

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- **Planning & Discovery**

OpenText will schedule a planning session to align on key details, including the Product Center or Product Line to be supported. During this session, we will clarify the roles and capabilities of your assigned expert—whether that’s a Named Support Engineer (NSE), Technical Account Manager (TAM), or Enterprise Support Manager (ESM). Together, we will confirm the start and end dates of the service.

- **Expert Onboarding & Priority Engagement**

Following the planning session, your designated Premium Support resource will be assigned and introduced during an onboarding call. From that point forward, you’ll have direct access to your expert for one sixth of their time over the 2-month remote support period (9×5). This allows you to quickly engage for critical issues, expert advice, or other mutually agreed tasks, ensuring immediate value and focused attention when it matters most.

Scheduled Expert Assistance package

This package helps customers who need an experienced technical expert to boost their in-house IT capacity. Whether it's technical guidance, administrative support, or operational assistance, our specialists provide hands-on help where it's needed most ensuring your team stays focused and productive.

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- **Planning & Discovery**

OpenText will host a one-hour planning session to align on your goals, scope, and scheduling.

- **Remote Support**

This flexible, expert-led engagement provides up to 40 hours of remote support over five consecutive business days.

Throughout the week, your assigned OpenText expert will work closely with your team, offering hands-on guidance and support tailored to your needs. This may include mentoring, troubleshooting, configuration and administration advice, and recommendations on underutilized product features.

Additional tasks can be accommodated based on mutual agreement. While onsite support is not included, it can be arranged separately with applicable travel costs.

Note: This package does not cover new software implementations or custom development.

Critical Event Support

Packages designed to ensure success during key milestones.

Go-Live HyperCare Support package

This package helps customers ensure a smooth and confident go-live by providing dedicated support from an OpenText expert during this critical period. The expert works closely with your deployment team to quickly address any issues that arise, ensuring minimal disruption. With 8 hours of on-call scheduled standby, rapid response to support needs, and regular status updates to your project lead, your team can stay focused while we help keep the launch on track.

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- **Virtual Knowledge Briefing**

During this 1-day virtual session, OpenText will:

- Collaborate with the customer's implementation team to review architecture, usage, change plans, and documentation to ensure a clear, end-to-end understanding of the solution.
- Align on key dates by confirming the implementation timeline, standby support window, and personalized support start date.
- Ensure seamless expert access by guiding the customer on how to quickly connect with their OpenText specialist when support is needed.

- **Scheduled Standby Support**

During a mutually agreed time and date, customers receive up to 8 hours of on-call Scheduled Standby access to an experienced OpenText expert while updates are performed. Before the standby period begins, a 1-hour pre-briefing helps confirm the timeline, review the system and planned changes, and walk through the support process. During the standby window, customers can reach their expert with a target response time of 30 minutes, ensuring fast, reliable assistance when it matters most.

- **Personalized Support**

Enjoy 1 month of personalized support (up to 24 hours) from the same OpenText expert who understands your unique environment and implementation. Available during local business hours, this expert can assist directly with your support cases, ensuring continuity and faster resolution.

About OpenText

OpenText enables the digital world, creating a better way for organizations to work with information, on-premises or in the cloud. For more information about OpenText (NASDAQ/TSX: OTEX), visit [opentext.com](https://www.opentext.com).

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