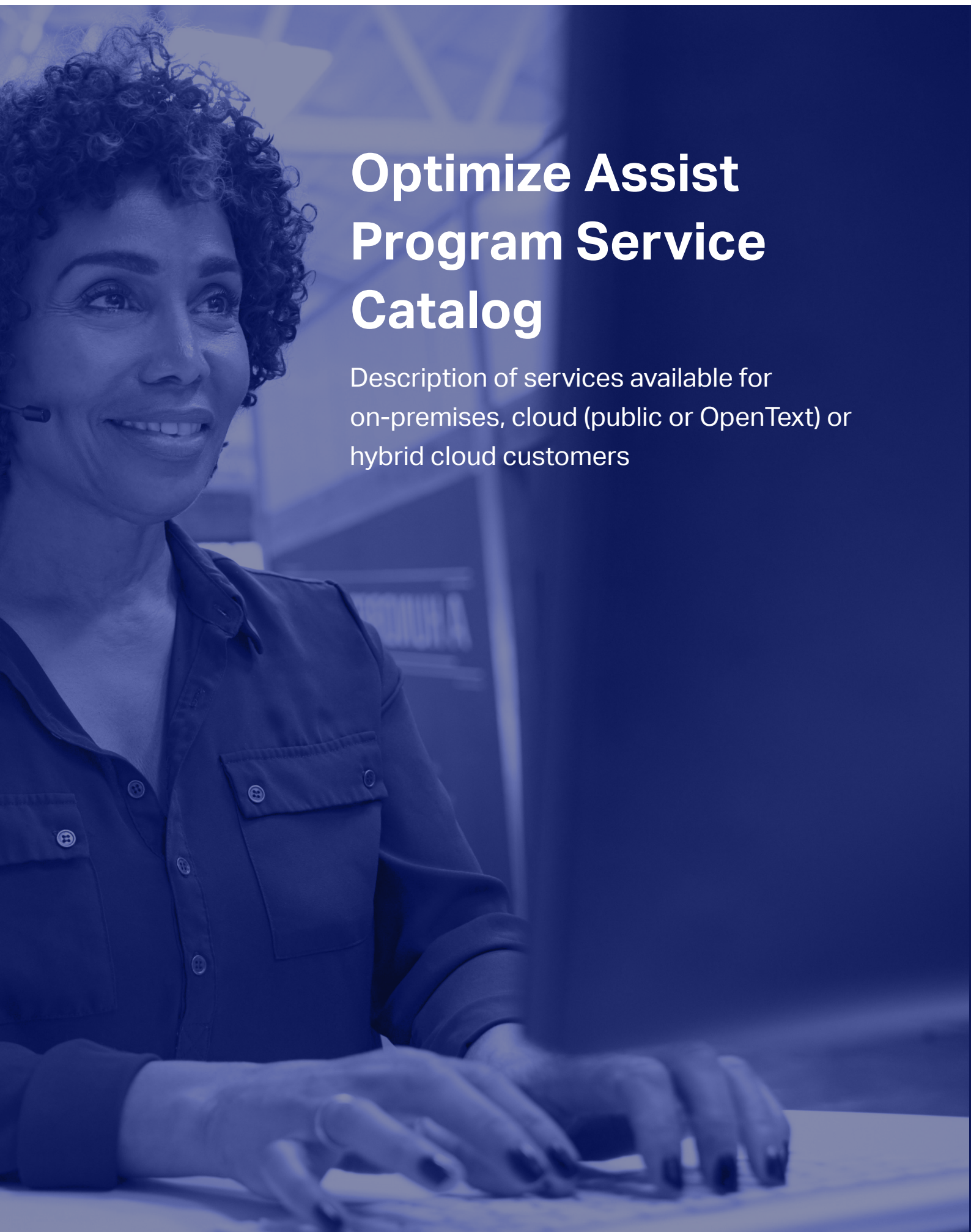# Optimize Assist Program Service Catalog

Description of services available for on-premises, cloud (public or OpenText) or hybrid cloud customers

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Introduction

OpenText offers and delivers an Optimize Assist Program that focuses on services and support. Helping customers improve their user experience, productivity, return on investment and overall satisfaction of OpenText software, whether it is implemented on-premises, in the cloud (public or OpenText) or in a hybrid cloud scenario.

Operating and maintaining advanced Information Management (IM) solutions can be a complex proposition for any organization. Delivering on these requirements requires in-depth technical know-how and expert knowledge of IM deployment and operational management. Many organizations need additional skills and resources to accelerate and streamline their digital journey. OpenText understands these challenges and has designed the Optimize Assist Program to alleviate some of those pressures.

As the pioneer of IM software, OpenText is an ideal partner to provide the expertise needed to achieve a successful implementation and smooth ongoing operations.

The Optimize Assist Program contains a number of core services with the ability to add additional optional services from the service catalog.

For customers who are looking for some assistance with managing their IM solution there are a range of Managed Services that are also available from the Professional Services team.

Optimize Assist Program

The focus of the program is to help customers operate and maintain their OpenText solution with fast and effective incident resolution.

This program includes the mandatory core essential services to support a customer's IM needs.

Additional services can be selected from the Optimize Assist Program Catalog and added to the Program in accordance with any specific business needs and requirements.

Core Program Benefits

- Improved user satisfaction and user adoption

- Faster resolution of incidents leading to reduced number and severity of follow-on incidents

- Improved stability and reduced downtime

- Advanced technical expertise

- Accountability and innovative problem solving from the OpenText team that developed the product

- Regular status calls and reporting

- Agreed service response times

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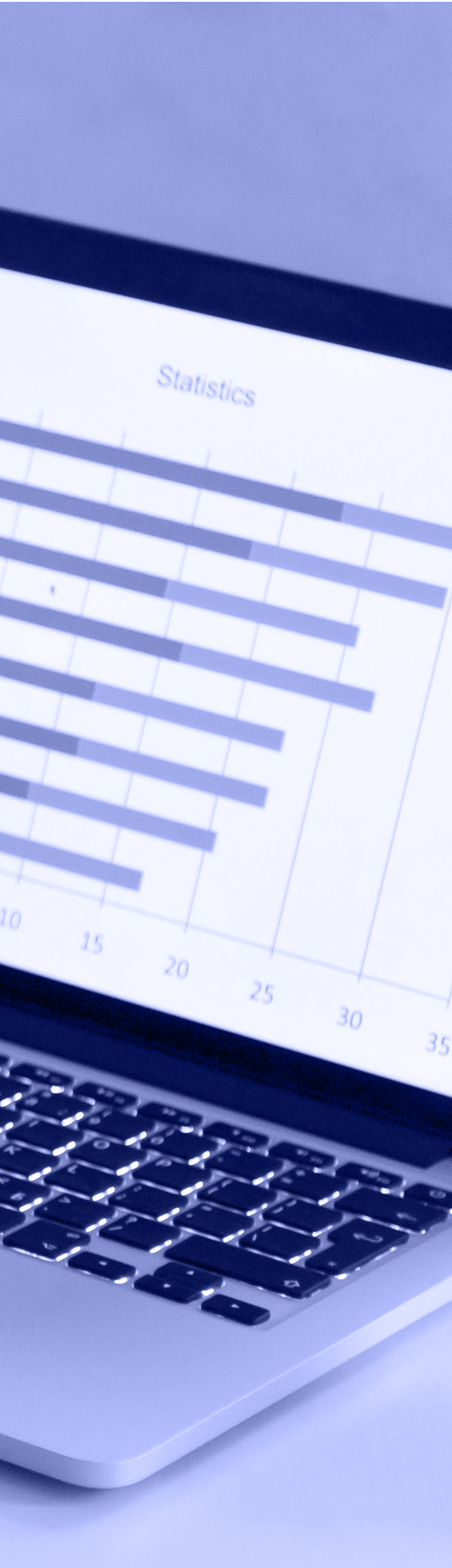
Core Services

Services included are:

- Service Manager as a single point of contact and accountable for the service and customer satisfaction with a Private Optimize Assist Program Workspace to manage and facilitate all communication and reporting between OpenText and the Customer (active throughout program term)

- Site Inventory to ensure asset, CI (Configuration Item) and CMDB (Configuration Management Database) documentation is current to allow for fastest intervention possible (once per program term, with updates)

- Incident Trend Analysis to identify issues, trends and determine potential candidates for future problem management

- Onsite/Remote Technical Assistance (pre-planned flex days) to resolve complex issues or to take over maintenance and support activities in case of limited availability of customer's staff.

These core services are defined in greater detail on the subsequent pages

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Optimize Assist Program - Service Manager

An Optimize Assist Program includes a Service Manager as a named single point of contact. They will have overall responsibility for customer satisfaction in the delivery and management of this program.

This assigned Service Manager has the following mandate:

- Assigned as the OpenText representative to manage the Optimize Assist Program contract throughout its life

- A named contact in the time zone closest to the customer, with the required language skills. This person is dedicated to developing and maintaining a trusted, long-term relationship between OpenText and the customer

- Establishes and enforces clear and consistent processes that help the customer to engage, improve and evolve with OpenText at all levels

- The Service Manager will generally be available from **Monday to Friday during normal business hours in the agreed time zone, excluding public holidays unless otherwise agreed upon by both parties** to respond to requests within a reasonable timeframe.

- Provide Program planning advice with status reports and calls on support requests and services. These reports will be available in the *Private Optimize Assist Program Workspace*. This OpenText customer service portal is used to manage and facilitate all communication and reporting between OpenText and the customer

- The Service Manager will offer structured analysis of incidents, identifying trends and issues in order to find similarities, creating input for problem management and the Known Error Database (KEDB). Improving system stability and performance.

- Closed Incidents are analyzed to identify similarities or trends. If there are any severe and repeated Incidents these are identified and a problem management ticket is raised.

Optimize Assist Program - Site Inventory Service

Overview

Included as part of each Optimize Assist Program, this service provides a detailed and technical site inventory document covering all areas of a given solution including: the high-level system architecture, network and server infrastructure, client and O/S configuration, OpenText solution installation and configuration. This documentation is required so that technical consultants have the information they need to respond quickly to incidents.

Benefits

OpenText will review and update the technical documentation detailing the most important elements of the system environment. This will be used as an up-to-date overview of the system in the event of a system failure.

Outcomes

The Site Inventory document typically contains a graphic overview with information about all relevant servers used for the specific installation or application. The overview should contain the following information:

- Logical overview

- Server names and IP addresses

- Server usage

- Two servers in case of cluster

- Storage information including disk size

- Load balancer and/or firewall information

- Lines displaying the communication between the servers, including ports

- Network information

- Third-party products, e.g. solutions for incoming documents

Important information for Emergency Support Admins will provide a quick overview of the customer's installation, including all required log-on parameters, such as:

- Business case, two sentences about the product usage and any SLAs OpenText or the customer has in place (short words)

- Installed product version, including patch level

- Log-on information - access to the systems, usernames and passwords including DB information (if possible)

- Configuration overview - installation path, log file path, start/stop scripts, or services

- How to section - guidelines to quickly solve recurring issues

- Short description of where to find and access system monitoring, if available and technical documentation of the most important parameters of the system environment

Optimize Assist Program - Incident Trend Analysis

Overview

Included in all Optimize Assist programs, this service provides quarterly analysis of all raised Incidents. The service is intended to identify issues, trends and determine potential candidates for future problem management.

The service offers a structured analysis of incidents in order to find similarities and create input for problem management and Known Error Database.

Benefits

Improved system stability and performance

Outcomes

- Closed Incidents are analyzed with regularity to identify similarities or trends.

- If any severe and repeated Incidents are identified, a Problem Management Ticket is raised

- Report of Incident Analysis

- Recommendation of Change Requests to improve stability and performance

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Optimize Assist Program - On-Site/Remote Technical Assistance (pre-planned flex days)

Overview

This service enables a customer to use OpenText Technical Consultants for on-site or remote expert technical assistance. These are flex days that offer pre-planned assistance by mutual agreement.

Benefits

Assists the customer's administration team to resolve complex issues or to take over maintenance and support activities in case of limited availability of customer's staff. These **pre-planned flex days** allow for customers to deal with the unexpected, by speaking to an OpenText Technical Consultant and receiving follow up support at a mutually agreed time.

Outcomes

OpenText provides a team of technical product experts familiar with the customer's solution and operating processes, such as Incident Management, Problem Management, and Change Management. This team assists the customer's admin team with all maintenance and support activities.

Result

The customer will receive access to a team of OpenText experts for on-demand assistance.

Note: On-site technical assistance may require agreement on travel logistics and expenses.

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Additional Optimize Assist Services available to be added to the Core Program

A selection of services have been created that are regularly added to a core Optimize Assist Program. Please speak to a Service Manager about the benefits that these additional services provide. They are grouped into four key areas - Skills, Ongoing Tasks, Upgrades, and Expert Checkpoints.

Skills

- Business Administration Services
- Staff Augmentation Service
- Application Support Service
- Operational Readiness Assessment
- Standby Expert Support /Assistance Service

Ongoing Tasks

- Monitoring Service
- Patch Management Service

Upgrades

- Upgrade Assessment Service
- Upgrade Service

Expert Checkpoints

- Environment Alignment Assessment
- Health Check Service
- Disaster Recovery Review Service
- Capacity Planning Service
- Performance Optimization Service

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Business Administration Services (Skills)

Overview

This service allows customers to offload classic "Super User" tasks to OpenText. Taking care of daily routine jobs and tasks that would otherwise occupy internal staff.

Benefits

OpenText delivers a defined set of "Super User" tasks, saving the customer from the need to have internal staff perform these functions.

Outcomes

A collection of initial deliverables will be agreed upon during the initial workshop.

Examples of deliverables include:

- User and Group Administration
- Search Admin
- Records Management Admin
- Workflow/Business Process Admin

Staff Augmentation Service (Skills)

Overview

This service enables a customer to use OpenText Technical expert(s) to provide coverage for a customer's staff when absent on planned or unplanned leave. Activities to be delivered are mutually agreed between OpenText and the customer.

Benefits

OpenText can help operate the customer's solution and provide cover for the customer's technical staff or enhance their staff during critical times to mitigate risk or develop and boost critical knowledge in the existing staff.

Outcomes

OpenText will provide a team of technical product experts familiar with the customer's solution and operating processes, such as Incident Management, Problem Management and Change Management. This team can take over responsibility for all maintenance and support activities necessary to comply with OpenText best practice and customer's processes.

OpenText will operate the customer's solution and provide cover for customer's staff based on the agreed scope.

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Application Support Service (Skills)

Overview

OpenText will support and maintain bespoke extensions, integrations and customizations made to the core OpenText product deployment.

Benefits

For solutions provided by OpenText Professional Services a maintenance agreement can also be offered that will provide the following benefits:

- Reporting incidents relating to customizations (as well as standard product) to OpenText Customer Support

- Track, analyze and review incidents and issues raised

- Maintain the knowledge related to the solutions with an assigned Primary Technical Specialist for the duration of the service contract.

Outcomes

The following services are included:

- A primary technical specialist is responsible for the program

- Support requests related to the customizations will be logged and managed by OpenText Customer Support

- The Service Manager is responsible for the coordination of all solution services support requests from creation to resolution

- The specialist will carry out necessary problem rectifications for the customizations defined in the agreement

Result

- Disruptions related to customizations will be reported to OpenText Customer Support in the same way as standard product issues, simplifying reporting and accelerating communication.

- When requested by the customer, the specialist will upgrade any customizations linked to a minor/major upgrade of the OpenText standard software. This upgrade is limited to the provision of customizations, with all necessary modifications in order to allow these to run on the new minor/major upgrade version of the OpenText standard software.

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Operational Readiness Assessment (Skills)

Overview

This service is recommended for customers who are undergoing the initial implementation of a new OpenText solution, with a specific focus on what activities can best assist the customer's IT team. The service assists the customer in developing plans, policies, tools and the knowledge needed to effectively administer, support and maintain the OpenText solution.

Benefits

- Assistance to the Support/Admin teams
- Structured and optimized Customer Support processes
- Improved understanding of OpenText Software
- Improved Risk Management
- Improved Strategic Planning

Outcomes

- Operational Readiness support is offered in addition to the Software Maintenance Program that customers will be subscribed to
- Proactive problem prevention
- Rapid resolution of issues encountered
- Positive end user experience
- Status reporting and regular meetings

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Standby Expert Support / Assistance Service (Skills)

Overview

This service provides standby services to offer a remote "safety net" for a customer's planned system events and business critical periods by providing supplementary internal IT Staff for evening and weekend work. This standby service is available 24/7, in support of customer business critical production environment activities.

Benefits

As a means of supporting maintenance work outside of normal working hours (e.g. the weekend), support can be requested with a lead time of four weeks. The additional agreed charges shall apply.

During the planned system event or business critical period, the customer will have additional know-how from the OpenText technical specialist(s) in order to receive any assistance that they may need.

Outcomes

- One or more highly experienced and dedicated technical specialists will be available remotely via email and telephone for any issues or questions the customer may have

- The specialist will closely work together with a customer's Solution Administrator to analyze the occurring issues to get them resolved or to find workarounds

- The specialist will work together with OpenText colleagues in other departments as needed (e.g. Customer Support, Development)

Result

- Continuous availability of highly experienced technical specialist(s)

- Continuous access to the best practice know-how of Optimize Services Programs during a critical maintenance or business phase

- Rapid support to resolve issues

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Monitoring Service (Ongoing Task)

Overview

The key to success of any deployment is that the application be available, functional, and performing well for end users. While many organizations have some basic monitoring tools in place, they find it difficult to perform application level monitoring on all their components. Therefore, issues may go initially undetected by IT, leading to more user complaints, reactive firefighting, and increased total cost of ownership.

Benefits

The Monitoring Program Service provides customers with a proactive monitoring system at a service and an application level, with ongoing adjustments and support for installed software.

Additional benefits may include:

- Reduced Administrative costs by reducing/eliminating manual monitoring of components or maintaining custom monitoring scripts

- Reduced time to fix issues by leveraging the information provided by alerts

- Fewer full system-wide outages by responding to early warnings

- Reduced internal support costs from fewer end user tickets

- Increased end user satisfaction and adoption

- Visibility into historical trends over time: component availability, storage consumption rates, etc.

Outcomes

The Monitoring is a subscription-based service providing organizations with the tools and guidance to proactively monitor their solution. This service allows organizations to detect a wide variety of issues early, often before the issue is reported by users.

A typical engagement would include the following activities:

- Review overall existing monitoring plans and documentation

- Provide monitoring options and recommendations

- Install the Monitoring tools (not available for all products)

- Configure the system with follow up adjustments

- Quarterly checks provided to ensure optimal configuration

Additional Offerings

OpenText can also monitor alerts for customers! During regular business hours, OpenText Administered Monitoring Program offers complete monitoring and minor corrective action for generated alerts. A 24x7 program is also available for production critical alerts.

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Patch Management Service (Ongoing Task)

Overview

This service enables OpenText Consultants to provide quarterly patch evaluation and preparation for handover in a Release (see Release Management). Consultants will review, highlight and recommend any mandatory and/or optional patches for the OpenText solution in place.

Benefits

Support of the Release Management and System Operation on a regular basis with recommendations regarding relevant patches and module updates appropriate to the OpenText products inside the customer's release bundle.

Outcomes

• OpenText will evaluate all patches for products used within the customer's solution and will create a package and a detailed description to enable the customer's Release Management to implement patches within the next release.

• Officially released OpenText patch updates for customer's solution are identified

• Delta status to the actual used patch level is identified

• Necessity of new patch candidates is determined

• Dependencies and impact of new patch candidates are verified

• Results are reported in time to the Release Management Cycle

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Upgrade Assessment Service (Upgrade)

Overview

This service provides analysis and advice to customers who are planning to upgrade to the latest version of an OpenText product or solution and desire to leverage the best practices of OpenText specialists.

Having a contact at OpenText to help navigate issue resolution, understand the different IM component versions, modules, patch levels, OS platforms, and databases, combined with availability of expert resources with in-depth technical knowledge of the application can be key to that success.

Benefits

With this Upgrade Assessment, the customer develops the optimal upgrade strategy together with the OpenText team.

Outcomes

- Analysis of the current configuration of the system

- Reports on the availability of components for the upgrade

- Recommends a high-level upgrade path

- List the essential upgrade efforts for customer-specific business cases

- Provides a collection of customer upgrade documentation and installable software

- Outlines strategies for dealing with the complexity of an upgrade

- Provide intermediate upgrade steps

The Upgrade Assessment results in an upgrade plan documented as a report, combined with a checklist and collections and a draft version of the documented test upgrade. In addition, the customer will receive a customization remediation plan.

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Upgrade Service (Upgrade)

Overview

Upgrading OpenText solutions or products can be a highly technical and time-intensive endeavor. This Service enables OpenText to partner with the customer and provide upgrade-related consulting services, either as an inline activity of the service or as a separate project for larger undertakings. During the term of the contract, OpenText will work with the customer to plan, test, and perform one upgrade on covered environments.

Benefits

The customer's solution will be upgraded to a mutually agreed upon supported environment

Outcomes

At a high level, this service includes:

- Project initiation/upgrade planning
- Product installations
- Upgrade testing (System sanity/smoke testing)
- Production upgrade
- Production cut-over
- Go live support
- Project management

The following are out of scope and would need to be part of a separate work order:

- Regression testing
- User support, training, and adoption assistance during and following the upgrade
- Custom coding of module upgrade or any other third-party code
- UAT script creation or execution
- Solution enhancements
- Customer-specific custom modules/development
- Customer-side changes and deployments as a result of the upgrade

Result

OpenText application(s) are upgraded successfully. Post upgrade testing of the new deployment and support confirms successful go-live and production solution is deemed operational.

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Environment Alignment Assessment (Expert Checkpoint)

Overview

This service ensures that the customer's various production and lower environments/ clusters are correctly aligned and reported on i.e. running the same versions, patches, and configuration as recommended for the OpenText solution in question.

Benefits

The process and activities to align different systems of the customer's environment are defined according to OpenText best practice.

Outcomes

• Review of the related OpenText solution environments

• Documentation of the environments

• Identification of any gaps and upgrades required

• Recommendations for optimized operational efficiency against OpenText best practice

• Review of report and Q&A

Result

A document that defines the procedure on how to align the customer's environment according to OpenText best practices.

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Health Check Service (Expert Checkpoint)

Overview

This service supports the identification of potential problems in the configuration and use of the OpenText solution. OpenText will check the solution's architecture, installation, configuration database and implementation performance.

This will be summarized in a written report that provides an overview of the checks performed with recommendations for improvement. The Health Check Service is conducted on a regular basis, the customer will be able to monitor and assess the effects of recommended changes on system performance, stability and usage/growth over time.

Benefits

OpenText will assess the system for potential failures or weak points. The customer will receive a report that summarizes recommendations for improvements or changes to establish a more optimally configured system.

Outcomes

An OpenText Technical Consultant will visit the customer on-site, or remotely review the IM system(s), and conduct the checks, which include:

- Review of the basic product architecture/installation/configuration

- Review of data integrity and data consistency

- Review of the search grid and other main IM software components and supporting sub-components

- Detailed performance review based on analysis of generated log files

- Review of the installation security (e.g. OS-level permission configurations)

- General review of database "health"

Result

The customer will receive a Health Check report based on the results of the OpenText analysis. The report summarizes:

- The checks conducted

- The results of the checks conducted

- An analysis of the checks conducted

- A set of recommended improvements/changes that will deliver a more optimally configured system

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Disaster Recovery Review Service (Expert Checkpoint)

Overview

This service provides the customer with a review of the current disaster recovery process and failover procedures for the implemented OpenText solutions.

Benefits

The objective of this review is to get a definition of Disaster Recovery/Business Continuity requirements and to discuss the critical service elements.

Outcomes

- Overview of the OpenText IM solution and how it is currently implemented
- Review Disaster Recovery/business continuity requirements within the OpenText environment
- Evaluation of RPO: Recovery Point Objective
- Evaluation of RTO: Recovery Time Objective
- Discussing the options and the requirements for all the relevant software components involved
- Database instances

Result

A summary of the OpenText findings and recommendations of the existing Disaster Recovery concepts will be delivered.

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Capacity Planning Service (Expert Checkpoint)

Overview

This service provides recommendations with regards to application sizing and scaling to meet future business requirements.

Benefits

The goal of Capacity Planning is to ensure that OpenText's IT resources and solutions are the right size to meet current any and all future business requirements, in a cost-effective way.

This service will provide customers with a comprehensive overview of the application environment, identifying trends in performance development and performance bottlenecks as early as possible.

An initial Capacity Report includes recommendations to change the environment's infrastructure or the application's configuration to improve overall performance. Regular assessments of the OpenText environment performance with a Capacity Report are recommended. This service includes a capacity monitoring tool as part of the initial Capacity Report. Subsequent Capacity Reports can be ordered additionally.

Outcomes

This service uses the OpenText proprietary monitoring tools to deliver a Capacity Management solution that monitors and predicts the performance of the OpenText solution.

This service includes:

- Installation and configuration of the OpenText proprietary monitoring tools during the program (if applicable)

- Creation of an initial report for System Monitoring and Capacity Planning

- Review of the initial report with the customer

- Recommendations based on the results of the Capacity Planning Report

The OpenText Capacity Planning solution will be installed in the customer's environment and can be used to perform Capacity Planning. A first report is delivered after an agreed timeline.

Optional Services:

- Additional System Monitoring Reports beyond the initial report

- Capacity Planning with a monitoring implementation of the OpenText environment

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Performance Optimization Service (Expert Checkpoint)

Overview

This service is for customers who wish to address existing performance issues and proactively identify potential performance bottlenecks before they negatively impact end-users' experience. This service is also designed for those who are interested in learning more about how their system is being used, possible weaknesses and, where relevant, comparative reports with earlier performance checks.

Performance issues are often complex and usually spread across application, platform and underlying infrastructure. After removing the first identified bottleneck(s), others can surface and need to be removed in a succeeding step. This process is generally repeated until the application performance is within a realistic customer window of expectation. The scope of this service is to cover the first step in the process. While this will help to identify and approach the first set of bottlenecks, it also puts the customer in a position to decide what the next actions should be and how many iterations are likely to be required.

In order to ensure that the root cause of a problem is being addressed rather than the symptom, it is important to have a clear overview of the environment and how individual components interact with and affect one another.

Benefits

The customer will receive a status report of the existing system performance and recommendations for addressing any performance issues and an overview of possibilities to increase the system performance.

Outcomes

- Quantify and measurement of the performance problem(s)

- Identification of the first set of potential bottlenecks within the system

- Evaluation of the system architecture

- Review of application design, integrations and implementation of critical modules

- General system review and identification of weaknesses with regards to response times, transaction throughput, stability and availability

- Review of current implementation and operational processes from performance standpoint

- A recommended action plan based on the findings of the items listed above

Results

The result of the service is a report that will go into detail of the analysis, providing results and recommendations specific to the customer's system and usage. Recommendations can include system, platform or application configuration changes and/or infrastructure upgrades. The report will also help customers gain a detailed understanding of how the system is being used. This report will include:

- Specific software configuration weaknesses

- Specific infrastructure bottlenecks

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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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More about OpenText Managed Services

For additional information about OpenText Managed Services please visit opentext.com/managedservices

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