Business Service Catalog

Description of available services for on-premises and cloud/hybrid cloud customers

2017
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Introduction

Operating and maintaining advanced Enterprise Information Management (EIM) solutions can be a complex proposition for any organization. The need to balance the core requirements of availability and performance, at the same time as ensuring user adoption and satisfaction, is a challenge for even the most accomplished IT teams. Even cloud and hybrid cloud implemented solutions present challenges in terms of operational readiness, user adoption, and the need for enhanced service management. OpenText Optimize Service Programs provide the services and support to drive successful business goal implementation.

Delivering on these requirements means in-depth technical know-how and expert knowledge of EIM deployment and operational management. Many organizations struggle to develop and retain these specialist skills in-house. We understand these challenges and have designed OpenText Optimize Service Programs to alleviate some of those pressures. As the pioneer of EIM software, OpenText is an ideal partner to provide the expertise needed to achieve a successful implementation.

OpenText Optimize delivers Professional Services programs that focus on helping optimize the use, productivity, return on investment, and overall user adoption and satisfaction of OpenText software, whether it is implemented on-premises, in the cloud or in a hybrid cloud scenario.

We recommend a tailored approach that is designed to deliver continuity and stability, and to build a long-term partnership. We provide the following foundational programs and many additional optional services.

Optimize Foundation Programs

Service programs with a tailored approach designed to deliver continuity and stability for on-premises, cloud or hybrid environments

- **STANDARD**: OpenText experts support your system
- **ASSIST**: OpenText experts assist your IT team to manage the system
- **MANAGE**: OpenText experts monitor and manage the system on your behalf
- **CLOUD ENHANCED**: Support and upgrades for customized cloud solutions
Standard Foundation Program

Benefits
Designed as a minimum program helping customers improve the resolution of incidents. The benefits of this program are:

• Advanced technical expertise
• Faster resolution of incidents
• One-hour response time

Services
Focus is to get a better understanding of customer’s OpenText environment in order to speed up resolution of incidents. Following services are included:

• Program Manager
• Site Inventory
• Configuration Review
• Program planning, regular status calls and reporting

Assist Foundation Program

Benefits
Designed as a minimum program helping customers operate and maintain their OpenText solution. The benefits are:

• Stability improvement
• Reduced downtime
• Reduced number and severity of incidents

Services
Focus of program is an analysis of weak points, recommendation and active support to resolve the most critical issues. Following services are included:

• Program Manager
• Site Inventory
• Health Check
• Incident Trend Analysis
• On-Site and Remote Technical Assistance

Options:
Following services may be chosen to improve the effectiveness of the program:

• Monitoring
• Patch Management
Manage Foundation Program

Benefits
Designed as a minimum program to operate the OpenText solution on behalf of the customer. The benefits of this program are:

• Customer’s IT team has more time for projects
• OpenText operates the complete solution (Managed Service)

Services
Focus of this program is a cost-effective operation of the customer’s OpenText solution. Following services are included:

• HyperCare with Program Manager
• Patch Management
• Incident Trend Analysis
• Monitoring
• Staff Augmentation

Options:
Following services may be chosen to improve the effectiveness of the program:

• Custom Solution Service

Cloud Enhanced Program

Benefits
This program is designed as an enhancement to add support for custom configuration and code for the OpenText Cloud solution and to include major upgrades of the underlying OpenText software. The benefits of this program are:

• Higher level of reporting and personal communication
• Maintenance for custom code
• Major Upgrade Service

Services
Focus of this program is to enhance the customer’s OpenText Cloud solution with services that cover the use of customer-specific configuration and code and Major Upgrades. Following services are included:

• HyperCare
• Custom Solution Service
• Major Upgrade Service

Options:
Following services may be chosen to improve the effectiveness of the program:

• Business Administration Services
• Functional and Technical Mentoring
• Learning Services Training/Enablement

Note: Options shown for Cloud Enhanced are fewer because many of the service options are part of Cloud Managed Services. Many of these services are performed and results are used internally by the cloud teams as they manage the customer’s application/solution in the OpenText Cloud as opposed to providing deliverables to customers.
Technical Service Descriptions

This document details all services currently available for inclusion in an OpenText Optimize Service Program. The customer-specific program typically comprises at least one of these services. All services define a basic standard for commonly-requested topics or activities and are designed to focus on activities that are repeatable. Most services can be further tailored or enhanced by customer-specific change requests.

Architectural Review Service

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Performed per contract

Overview
This service is designed to model architectural needs based on the review and analysis of past and current usage and future requirements, thereby minimizing the impact on users as the system evolves over time.

Benefits
The objective of the Architectural Review Service is to provide guidance on architectural changes that may be required due to evolving business requirements and an increasing usage load on OpenText applications.

Outcomes
Customers will receive the following benefits from this service:
• Detailed understanding of how the system has been affected by usage
• Formal review and anticipation of future application requirements
• Architecture recommendations for current and anticipated future usage
• Ability to proactively minimize the performance impact to users due to changing usage demands

An Architectural Review Report is delivered including:
• Documentation or reference to current state of architecture and usage impact
• Documentation or reference to future requirements
• Technical Specifications based on past usage and future requirements

Business Administration Services

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Overview
This service allows OpenText to deliver a number of classic “Super User” tasks via a help desk team.

Benefits
OpenText delivers a defined set of Super User tasks.

Outcomes
A collection of initial deliverables will be agreed upon during the initial workshop.
Examples of deliverables include:
- LiveReport Admin
- User and Group Administration
- Enterprise Workspace/Taxonomy Maintenance
- Search Admin
- Records Management Admin
- Content Server Workflow Admin
- Content Server Perspective Admin
- Content Server Project Admin

Deliverables and delivery process are defined in a document and provided within the boundaries of the defined effort:
- Document to describe Super User tasks
- Document to describe the processes and Service Levels around these Super User tasks
- Delivery of Super User tasks (up to an effort of 12 days)

## Capacity Planning Service

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**Overview**

This service provides an assessment of the OpenText solution’s current resource usage. Using past and future growth trends, both infrastructure and application level are analyzed, along with estimated capacity needs.

**Benefits**

The primary goal of Capacity Management is to ensure that IT resources of the OpenText solution are right-sized to meet current and future business requirements in a cost-effective manner.

The goal of this service is to provide a long-term overview and trends regarding the environment’s performance development, to identify performance bottlenecks as early as possible. Part of this service is the creation of an initial Capacity Report. Recommendations are provided to change the environment’s infrastructure or the application’s configuration to improve overall performance. Regular assessment of the OpenText environment performance with a Capacity Report is recommended. This service includes the capacity monitoring tool set-up and initial Capacity Report. Subsequent Capacity Reports can be ordered in addition or separately.

**Outcomes**

OpenText offers an OpenText System Monitoring App that supports capacity monitoring over time for some OpenText products, such as Content Server and OpenText™ Archive Server (Version 10.5 or later). The OpenText System Monitoring App is based on the Splunk® framework, which is provided by Splunk ([www.splunk.com](http://www.splunk.com)).

This service utilizes the System Monitoring App to deliver a Capacity Management solution that is able to monitor and predict the performance of the OpenText solution.
This service includes:

- Installation and configuration of the System Monitoring App
- Creation of an initial report for System Monitoring and Capacity Planning
- Run through of the initial report with the customer
- Recommendations based on the results of the Capacity Planning Report

The OpenText Capacity Planning solution is installed in the customer’s environment and can be used to perform Capacity Planning. A first report is delivered after a specified time period.

**Services not included**

- Any third-party applications in Splunk, other than OpenText applications (Content Server, Archive Server etc.)
- Any third-party Splunk apps
- Performance optimization of the Splunk installation
- Upgrade of the Splunk installation
- Back-up and Restore of the Splunk installation

**Services to be ordered additionally**

- Additional OpenText System Monitoring Reports beyond the initial report are not included in this service
- It is recommended to complete the Capacity Planning with a monitoring implementation of the OpenText environment

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### Configuration Review Service

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**Performed per contract**

**Overview**

This service supports the proactive identification of potential problems in the configuration and usage of the OpenText solution. A review is carried out of the OpenText solution’s installation and configuration. Results are summarized in a presentation that provides a high level review of the checks performed and any recommendations regarding areas of future focus.

**Benefits**

The solution will be assessed to identify potential failures and weak points. The customer receives a presentation and a report providing recommended further possible steps.

**Outcomes**

- Review of the basic product architecture/installation/configuration
- High level review of data integrity and data consistency
- Review of the search grid and other main EIM Solution components
- High level performance review based on analysis of generated log files
- High level review of database “health” and global database configuration
- Review of the installation security (e.g. OS-level permission configurations)
- Presentation of:
  - Checks conducted
  - Checks description
  - Results of checks
  - Recommendations
Custom Solution Services

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Overview
This service uses Optimize Technical Consultant resources to support and maintain bespoke extensions, integrations, and customizations made to the core OpenText product deployment.

Benefits
For Solution Packages provided by OpenText Professional Services, a maintenance agreement can be offered in the context of the OpenText "Optimize Service Program."

Advantages
• Incidents relating to Solution Packages supported via this service can be reported to OpenText Customer Support in the same way as standard product issues. This streamlines the reporting process and ensures that issues are raised, tracked, and addressed quickly and effectively
• Incidents can be analyzed and rectified in the context of the entire solution. Delays caused by unclear differentiation between the standard product and these Solution Packages are avoided
• Knowledge relating to the Solution Packages is maintained within OpenText throughout the life of the service contract, making it possible to efficiently analyze and rectify incidents whenever they occur. Customer training in the bespoke elements becomes unnecessary and the typical delays associated with fault finding and rectification for unsupported solution components is virtually eliminated

Outcomes
The following services are included:
• OpenText warrants that the knowledge relating to the Solution Packages defined in this agreement is maintained by a primary technical specialist (and a secondary backup resource, if necessary) for the contract duration of the program
• Support requests related to the Solution Packages defined in this agreement are logged and managed by OpenText Customer Support
• Support requests related to the Solution Packages defined in this agreement are forwarded to the Service Program Manager by OpenText Customer Support for assignment to a suitable technical specialist. The Service Program Manager is responsible for the coordination of all Solution Services support requests from when they are raised through to their resolution
• The specialist carries out all necessary problem rectifications for the Solution Packages defined in this agreement
• When requested by the customer, the technical specialist will create an upgrade for any current Minor/Major Upgrade of the OpenText Standard Software for the Solution Packages defined in this agreement. The upgrade is limited to the provision of Solution Packages, with all necessary modifications in order to allow the packages to run on the new Minor/Major Upgrade Version of the OpenText Standard Software

Result
Disruptions related to Solution Packages can be reported to the central OpenText Customer Support in the same way as standard product issues. This simplifies the issue reporting process and accelerates communication.

On request of the customer, the specialist will create an upgrade for any current Minor/ Major Upgrade of the OpenText Standard Software for the Solution Packages defined in this agreement. The upgrade is limited to the provision of Solution Packages, with all necessary modifications in order to allow the packages to run on the new Minor/Major Upgrade Version of the OpenText Standard Software.
Database Review/Optimization Service

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Performed per contract

Overview
This service delivers an analysis of the current configuration of the Content Server Oracle® database. Recommendations are provided to the customer for improving the database configuration and performance.

Benefits
OpenText analyzes the database of the customer in order to achieve optimal performance of the OpenText solution.

Outcomes
Analysis of:

- Database settings and configuration, including RAM usage
- Data file and log file storage and usage
- Data and indices
- Error log
- Usage statistics
- Optimization of all suboptimal processes according to the customer requirements
- Customer receives best practice advice for Oracle database to operate with the OpenText solution
- The Oracle database is optimized for the OpenText solution

Delivery/Program Management Service

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(called Program Management) (called Program Management) (included and called Delivery Management)

Overview
This service provides a named single point of contact, who has overall responsibility for the management and delivery of all aspects of the customer’s Optimize Service Program.

Benefits
The assigned manager is part of the regional OpenText Professional Services team with the following roles/responsibilities:

- Assigned OpenText representative to manage the Enterprise Cloud/Optimize contract throughout its life
- Responsible for coordinating a successful and highly available Service/Optimize Program
- A named contact in the right time zone and with the right language skills, 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 effectively with OpenText at all levels
Outcomes

- The Delivery Manager is available from Monday to Friday 08:30-17:00 (in the agreed time zone) to respond to requests within a reasonable timeframe. Provides a Monthly Status Report on Support Requests and Services.
- Optimize Service Collaboration Workspace in order to administer the communication and reporting between OpenText and the customer.

Disaster Recovery Service

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Performed per contract

Overview

This service provides the customer with analysis, set-up and testing of a disaster recovery environment and failover procedures for the implemented OpenText solutions.

Benefits

The target of this objective is to get a definition of Disaster Recovery/Business Continuity requirements and to discuss the requirements:

- Customer resources with application and infrastructure knowledge are available.
- If the workshop takes place at the customer’s location, they would provide a suitable conference room with a data projector, a whiteboard, and a flipchart.

Outcomes

- Overview of the OpenText EIM solution and how it is currently implemented.
- Define Disaster Recovery/business continuity requirements.
- RTP: Recovery Time Perspective.
- RTO: Recovery Time Objective.
- Discussing the options in regard to the requirements for all involved software components.
- Storage platform.
- Database instances.
- Client interaction.
- Planning of further steps.

Result

An up to date Disaster Recovery Concept Document is available for use. A Back-Up and Recovery process has been tested. In case a disaster takes place, the critical service components can be restored in a short time.
Environment Alignment Assessment

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Performed per contract

Overview
This service ensures that the customer’s various Production and Change environments/clusters are properly aligned 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
- Recommendations for optimized operational efficiency against OpenText best practice
- Review of report and Q&A

Result
Document that defines the procedure to align the customer’s environment according to OpenText best practices.

Functional and Technical Mentoring

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Overview
This service engages OpenText consultants to assist in providing knowledge transfer and guidance to the customer’s administrative teams, with the goal of operational improvement and self-sufficiency. Functional and technical mentoring topics are mutually agreed between OpenText and customer.

Benefits
Customer’s administrative teams are able to operate the OpenText solution based on OpenText best practice without any help or guidance from external product experts.

Outcomes
OpenText provides a team of technical product experts to help the customer become familiar with the most important maintenance and support activities necessary to operate their OpenText solution.

Result
Constant improvement of customer’s administrative teams operational readiness.
Health Check Service

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**Overview**
This service supports the proactive identification of potential problems in the configuration and usage of the OpenText solution. A check will be carried out on the OpenText solution’s architecture and installation, configuration, database, and implementation performance. The result of this verification will be summarized in a written report that provides an overview of the checks performed and any recommendations for improvement.

If 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**
The system will be assessed and potential failures or weak points, identified, and addressed. The customer receives a report based on the results of the analysis that summarizes recommendations for potential improvements or changes to establish a more optimally configured system.

**Outcomes**
An OpenText Optimize Consultant visits the customer on-site or remotely, reviews the EIM system(s), and conducts the checks, which include:

- Review of the basic product architecture/installation/configuration
- Review of the main EIM 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 receives 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
HyperCare Service

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Overview
This service provides the customer with a proactive advocate within OpenText who:

- Is the single main point of customer contact for any operational or process-related issues relating to the OpenText solution
- Is responsible for understanding and championing the customer’s specific business requirements within OpenText
- Is located in the right geography with regular face to face contact
- Acts as an extension of the customer’s in-house Service Management function
- Is a trusted advisor always looking to prevent further incidents and provide process improvement in both organizations
- Is fully involved in the coordination and management of critical incidents across all OpenText/customer teams

Benefits
World-class Service Management and Governance through a dedicated, named individual who is integrated into the customer’s organization

- Nominated representative of OpenText to manage the Enterprise Cloud Optimize contract throughout its life
- Responsible for ensuring a successful and highly available Service/Optimize Program
- A person in the right time zone, with the right language skills to foster a close relationship with the customer
- Sets expectation on how to interact efficiently with OpenText using standard processes
- Defines and agrees goals with the customer
- Sets up a service plan in order reach goals
- Represents customer interests with regard to the service plan, prioritization of the support tickets, and change requests

Outcomes
Full service management with the addition of functional and technical reporting that provides deeper insight into daily operation of the system. Reporting and monitoring of incidents on a proactive basis by the Program Manager (PM)/Delivery Manager (DM).

The PM/DM is available from Monday to Friday 08:30 - 05:00 pm (in the agreed time zone) to respond on request within a reasonable timeframe. The PM/DM is responsible for maintaining the agreed service level and also for the implementation of emergency responses. The PM/DM organizes and coordinates the response right through to the resolution of the emergency situation.

Program Managers/Delivery Managers are critical to success. A PM/DM can help with more proactive support, enhanced reporting, and improve success rates.

The PM/DM is ITIL-certified and suggests best practices processes for incident and problem handling and further ITIL areas, appropriate to the customer’s solution.
Result

- Highly personalized, tailored approach
- Program Manager/Delivery Manager who understands and supports your business
- Service management assessment with goal setting and controls
- Proactive and preventative view of account incl. Service Plan
- Status Report about Support Requests and Services
- Optimize Service Collaboration Workspace in order to administer the communication and reporting between OpenText and the customer
- Achievement of commonly agreed goals
- Reporting on incidents, root cause analysis, roadmap, forecasting, and more:

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<tr>
<th>NAME AND PERFORMANCE REPORTING</th>
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<tr>
<td>INCREASED PROBLEM AND PERFORMANCE REPORTING</td>
<td>Root Cause Analysis and Problem Management updates for all outages Application Performance Management data agreed as being both relevant and of value by both parties</td>
<td>Monthly</td>
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<tr>
<td>USAGE FORECASTING</td>
<td>Consumption forecasts</td>
<td>Monthly</td>
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<tr>
<td>SECURITY REPORTING</td>
<td>Regular detail on the monitoring and detection of security-related events (including a response plan in the event that a security breach occurs)</td>
<td>Monthly</td>
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<tr>
<td>ROADMAP</td>
<td>In-depth review/advance notice of future releases, features, or functionality that are of relevance or interest to the customer, critical s/w support lifecycle information</td>
<td>Twice a Year</td>
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<tr>
<td>CERTIFICATION</td>
<td>Appropriate and available accreditations (and roadmap) to be agreed and discussed between both parties</td>
<td>Annually</td>
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<tr>
<td>ARCHITECTURE DIAGRAM</td>
<td>OpenText will maintain and publish on demand an up-to-date Architecture Diagram (but excluding IP and other data that could impact system security)</td>
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**Incident Trend Analysis Service**

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Performed per contract

**Overview**

This service provides quarterly analysis of all raised Incidents, intended to identify issue trends and determine potential candidates for future Problem Management.

The service offers a structured analysis of Incidents to find similarities and create input for Problem Management and Known Error Database.

**Benefits**

Improved system stability and performance

**Outcomes**

Closed Incidents are analyzed every quarter to identify similarities or trends, and for each case where 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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**Major Upgrade Service**

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**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. During the term of the contract, OpenText will work with the client to plan, test, and perform one major upgrade on covered environments.

**Benefits**

Customer’s solution upgraded to mutually agreed upon supported environment

**Outcomes**

At a high level, this service includes:

- Project Initiation/Upgrade Planning
- Product Installations
- Upgrade Testing
- Production Upgrade
- Project Management

The following are not covered:

- 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
- Change requests and enhancements
- Customer-specific custom modules/development
- Customer Client side changes and deployments as a result of the upgrade
- Disaster Recovery testing Project management

**Result**

Customer core OpenText environment is upgraded successfully, as are any customizations, custom code, or third-party applications. Post upgrade testing and support confirms successful go-live and production solution is deemed operational.
On-Site and Remote Technical Assistance

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**Overview**
This service enables a customer to utilize OpenText Technical Consultants for critical/complex on-site or remote expert technical assistance.

**Benefits**
Assist 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.

**Content**
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 is able to assist the customer’s admin team with all maintenance and support activities necessary to comply with OpenText best practices and the customer’s processes.

**Result**
OpenText operates the customer’s solution and provides cover for the customer’s administration staff based on the agreed range.

Operational Readiness Assessment Service

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**Overview**
This service focuses on activities that assist the customer’s Service Support/Management team(s) with the development of the plans, policies, tools, and knowledge required to effectively administer, support and maintain the OpenText solution. Therefore, all existing IT processes of the customer will also be evaluated as integration possibilities of the EIM system into these procedures.

The service identifies which critical components should be monitored. Roles and tasks are defined and respectively introduced and documented, so that actions and disaster recovery measures can be transacted.

**Benefits**
The objective of this workshop is the definition of the necessary actions for integrating the EIM systems in the existing IT landscape and the operating of a computing center.

**Outcomes**
- The result of this workshop is a scheme of the necessary work packages and the recommended actions including responsibility on OpenText and customer side
  - Incident Management
  - Troubleshooting Guide (Helpdesk)
  - Monitoring
  - Definition of the event trigger
  - Evaluation of the integration of Monitor/DP in customer monitoring/ application parts
  - Definition of the errors/states that should be announced
• Capacity
  • Definition of the parts of the system that should be monitored: file system, data bases, storage system

• Enabling
  • Administration
  • Job administration
  • Troubleshooting
  • Integration to operating
  • Back-up process
  • Handling of storage media
  • Incident management

• Business Continuity Concept
  • Definition of the constituent parts of the BCC
  • Operating systems
  • File systems
  • Databases
  • Storage technology: WORM, Centera®, NetApp®
  • Definition of the parts of an existing operating manual that need to be adjusted

• Change Management
  • Definition of the concept parts of test and development system
  • Definition of the composition of test and development system
  • Specification of the constituent parts
  • Necessary system components
  • Work instructions for the transfer of configuration/developments/patches from test to production system
  • Specification of predefined test suites
  • Specification of the information chain, as well as the approval processes
  • Checklist for the introduction of new DMS projects

On-Call Assistance

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Overview
This service provides “Priority 1” (system down) Incident Management and execution of Administration SOPs outside of normal office hours or within mutually agreed upon timeframes.

This service covers Priority 1 Incidents (system standstill) and performing of system administration and reestablishing the service for incidents as defined in standard operating procedures as well as changes outside normal working hours.

Benefits
The aim is to relieve the strain on administrators outside office hours.

The OpenText team will be on standby outside office hours to handle any Priority 1 incidents, as well as issues defined in SOPs. The team will also carry out properly documented and checked changes on the customer’s OpenText environment.
Outcomes

- Review of the basic product architecture/installation/configuration and establish (if not already available) a site inventory document/operations handbook/logbook
- A Health Check, (if not already done) should be performed in order to identify any possible issues
- Workshop for definition and creation of 25 standard operating procedures in order to restore the service
- On-Site workshop with expert to review and agree on SOPs with customer
- Carry out tests to establish that SOPs work as desired
- Establish and test processes for monitoring and alarming of specialists in case of incidents
- Standard ticket handling via OpenText ITSM. Customer establishes procedure to open Priority 1 ticket in ITSM. In case customer requirements differ, special procedures may have to be established
- Regular closed loop communication between customer and CoE Team
- Guaranteed availability of specialist from CoE Team

Establishing and running a service recovery for Priority 1 incidents (service standstill) and system administration as per defined standard operating procedures as well as performing changes on customer environment

Patch Management Service

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Performed per contract

Overview

This service enables OpenText Consultants to provide quarterly patch evaluation and implementation. Consultants review and highlight any mandatory and/or optional patches for the OpenText solution.

Benefits

Support the Release Management and System Operation on a regularly basis with recommendation regarding relevant patches and module updates appropriate to the OT products inside the customer’s release bundle.

Outcomes

OpenText evaluates all patches for products used within customer’s solution and creates a package and a detailed description to enable customers Release Management to implement patches within the next release

- Officially released OT 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
Performance Optimization Service

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**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. 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 receives a status report of the existing system performance and an overview of all possibilities to increase the system performance.

**Outcomes**

- Identification of possible bottlenecks within the system
- Evaluation of the system architecture
- General system review and identification of weaknesses
  - Average execution time
  - Transactions per second over time
  - Thread utilization over time
  - Request execution times
  - Indexing and search performance
  - Relative performance of network links
- Optimization of web server answer times
- Optimization of search answer times
- Analysis of the authorization concept
- Analysis of the Database
  - Database throughput
- Check possibilities of vertical growths (more instances on a server, usage of several frontend servers)
  - Load balancing of servers in a cluster
- A short concept is written based on the findings of the items listed above

The outcome of the engagement is a report provided to the customer that goes into detail of the analysis, provides results and recommendations specific to the customer's system and usage. This report will include information from the analysis above, as well as:

- Valuable usage profiling information, such as:
  - Request breakdown by frequency
  - Average execution time for top requests
  - Top 10 requests by execution time
- Specific software configuration weaknesses
- Specific hardware bottlenecks
- Usage of the system in several views
The report shows customers where performance issues exist and areas where improvements may be achieved. Recommendations for performance improvement can include system/application configuration changes and/or hardware upgrades. The report will also help customers gain a detailed understanding of how their system is actually being used by their users.

**Site Inventory Service**

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**Overview**

This service provides a detailed technical document covering all areas of a given Solution – including the high level system architecture, network and server infrastructure, client and O/S configuration, and OpenText solution installation and configuration. This documentation is obligatory for most Optimize Services, as only this can guarantee a fast response to failures.

**Benefits**

A technical documentation of the most important parameters of the system environment in order to be able to gain an up-to-date overview of the system in the event of a system failure.

**Outcomes**

The Site Inventory document contains a graphical overview with information about all involved 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 to give them 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 a system monitoring, if available
- A technical documentation of the most important parameters of the system environment
Staff Augmentation Service

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**Overview**
This service enables a customer to use OpenText 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 is able to operate customer’s solution and to provide cover for customer’s administration staff or enhance their staff during critical times to mitigate risk, add administrative capacity or add knowledge lacking in the existing staff.

**Outcomes**
OpenText provides a team of technical product experts familiar with customer’s solution and operating processes, such as Incident Management, Problem Management and Change Management. This team is able to take over responsibility for all maintenance and support activities necessary to comply with OpenText best practice and customer’s processes.

OpenText operates customer’s solution and provides cover for customer’s administration staff based on the agreed range.

Standby Expert Assistance Service

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**Overview**
This service provides standby services to offer a remote “safety net” for a customer’s planned system events and business critical periods. This standby service is available 24/7, in support of customer business critical production environment activities.

Standby assistance is provided in accordance with delivery hours as specified in the passage “Working Hours.”

**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 OT technical specialist(s) in order to get any assistance they need.

**Outcomes**
- One or more highly experienced 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 your OT solution Administrator to analyze the occurring issues to get them resolved or to find workarounds
- The specialist will work together with OT colleagues of other departments if 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
- Fast support for resolving or bypassing issues
Troubleshooting Workshop Service

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**Overview**

This service provides customer System Administrators with the knowledge and skills to identify and resolve common problems that may occur in a production EIM environment. The workshop includes the use of troubleshooting, performance analyzing tools or utilities available via an Optimize Service Program.

**Benefits**

The workshop incorporates a full program of classroom-based training and assessment that:

- Condenses and intensifies the learning experience
- Provides advanced understanding of many aspects of EIM support and troubleshooting
- Guides support employees into proven best EIM troubleshooting practices

**Outcomes**

The workshop will provide an understanding of, and practical experience in, troubleshooting:

- Content Server
- Database (General and Oracle)
- Search and indexing issues
- Content Server infrastructure
- Content Server SDK

An extensive troubleshooting exercise will be conducted to bring the learning into practice. The workshop provides the student with handouts that can support the troubleshooting process for his/her own EIM system, for example: Troubleshooting Flowchart, Troubleshooting Search Checklist, Change Agents FAQ, and Enterprise Indexing Implementation explained.

**Result**

Customer receives overview of the OpenText components with the important log files and where to look if an issue occurs.

Upgrade Assessment Service

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**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 liaison in Optimize to help navigate issue resolution, understand the different EIM component versions, modules, patch levels, OS platforms, and databases combined with availability to expert resources with in-depth technical knowledge of the application and repeated upgrade experience can be key to that success.
Benefits
With this Upgrade Assessment, the customer develops together with OpenText an optimal upgrade strategy.

Outcomes
• Analysis of the current configuration of the system
• Reports on the availability of components for the upgrade
• Suggests a high level upgrade path
• List the essential upgrade efforts for customer-specific business cases
• Provides a collection of customers appropriate OT 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. As well, the customer will receive a customization remediation plan.

About OpenText
OpenText is the leader in Enterprise Information Management, helping customers to create a Digital-First World by simplifying, transforming, and accelerating their information needs. More than 100,000 customers already use OpenText solutions, either on-premises or in our cloud. For more information about OpenText (NASDAQ: OTEX; TSX: OTC), please visit opentext.com.

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