Upgrade Assessment Service

Get advice and guidance from OpenText experts when planning an upgrade and understand the key considerations to ensure a smooth upgrade path.

Managing the many different elements in a software upgrade can be a challenging process for organizations. Ensuring all key aspects of an environment are taken into consideration can be daunting. Although organizations may have a knowledgeable team, the skillset required for a successful upgrade is not commonly used in day-to-day work.

OpenText’s Upgrade Assessment Service provides analysis and advice to organizations who are planning to upgrade to the latest version of an OpenText product or solution and wish to leverage the best practices of OpenText specialists. It provides an approach that ensures minimal business impact with peace of mind and confidence for a successful upgrade project.

OpenText consultants help organizations to navigate potential issues and understand the different Information Management (IM) components such as versions, modules, patch levels, OS platforms, and databases. The availability of expert resources across the Product Management and Engineering teams who have in-depth technical knowledge of the application can be key to upgrade success.

The OpenText Upgrade Assessment provides services that bring together highly experienced upgrade specialists who will work with an organization's in-house IT teams to help develop an optimal upgrade strategy.
Following best practices

Organizations benefit from well-established procedures based on OpenText’s vast experience delivering upgrades and assessments. The team can help steer around potential issues by using best practices—we do this all the time.

Experienced consultants

OpenText has over 1400 consultants that are 100% OpenText Product certified. The team has years of experience covering all aspects of OpenText applications with an ability to provide deep expertise on specific areas where necessary.

Upgrade plan

The Upgrade Assessment results in an upgrade plan and documented report combined with a checklist and collections. In addition, a customization remediation plan will be provided.

Peace of mind

As the product vendor, OpenText is uniquely positioned to provide expert guidance and advice for a successful upgrade plan. Easy access to other parts of the organization such as Product Management, Engineering and Customer Support ensures the best possible advice and support is given to customers.

Key focus areas

| Current state issues and concerns | • The timeline for support and maintainability of current environments.  
|                                 | • Any 3rd party software the current environment is running on such as Operating Systems or Databases. For older versions, the 3rd party software itself may be significantly out of support, creating risks. |
| Customization review             | • Many systems have been heavily customized to tailor the user experience to the customer’s business requirements. In some cases, these customizations may be rendered obsolete by improvements in the software.  
|                                 | • The review will result in a plan for each customization, identifying areas for improvement and cost savings. |
| Future state goals              | • Understand the benefits of the newer version specific to the organization’s business objectives.  
|                                 | • Review additional areas such as roll-outs to new user communities, availability of new functionality, or access to new integrations in an upgraded software stack.  
|                                 | • Specific areas to consider for a newer version such as Smart UI changes, productivity, mobile, or integrations.  
|                                 | • Review the benefits of moving to the cloud. |
| Planning the upgrade            | • Develop a high level direction for the upgrade path with the customer team, including user experience and back-end server components.  
|                                 | • A plan will be provided that will identify the high level steps of the upgrade process and elements that will need to be considered as part of the project. |
Outcomes of the assessment

- Analysis of the current configuration of the system
- Outline of strategies for dealing with the complexity of the upgrade
- Report on the availability of components for the upgrade
- Recommendations for a high-level upgrade path
- Listing of the essential upgrade efforts for customer-specific business cases
- Details on intermediate upgrade steps if appropriate

The Upgrade Assessment commonly takes between 5-15 days to complete depending on the complexity of the environment, including the number of locations, products and integrations involved.

Contact us at: profservices@opentext.com
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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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