



# Documentum Upgrade Assessment Service

Software upgrades are vital for organizations to improve performance. To maintain a competitive advantage, internal resource efficiency and service levels, organizations should ensure they are running the most up-to-date versions of their enterprise software portfolio.



**Customers interested in exploring their options for a Documentum upgrade are encouraged to engage with OpenText to conduct a 5-day Professional Services Documentum Upgrade Assessment to:**

- Leverage our knowledge with our products, and the underlying third-party components, to define the optimal future state for your environment
- Benefit from our experience of upgrading hundreds of customers world-wide
- Learn from us to define the most efficient upgrade path for your environment



## Special time-limited offer:

Customers receive a credit to cover the full cost of the 5-day upgrade assessment when they engage with OpenText Professional Services to upgrade to Documentum 16.7



## The 5-day Documentum upgrade assessment includes:

- **Evaluation of the current implementation**
- **A plan for platform upgrade**
- **Recommendation for the UI upgrade:**
  - Evaluate use of Webtop (if applicable)
  - Upgrade path to D2
  - Need for case/process management
- **Additional Recommendations:**
  - Best approach to leverage existing 3rd party software integration/complexity
  - Custom code options

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After a day of preparation, reading the documentation the customer has on the current system and familiarizing themselves with their longer-term goals, the SME will lead the customer team in a two-day workshop.

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As part of the Documentum upgrade assessment, an OpenText Upgrade Subject Matter Expert (SME) meets with the customer's team (onsite or remote), to discuss all aspects of their current state situation and future state goals.

## Two-day workshop subject areas:



### Current state issues and concerns:

- The timeline for support and maintainability of current environments.
- 3rd party software, such as OS or DB, that the current Documentum environment is running on. For older versions of Documentum, the 3rd party software itself may now be significantly out of support, with inherent security, stability and sustainability risks that this situation entails.



### Future state goals:

- Review areas such as roll outs to new user communities, availability of new functionality, or access to new integrations in an upgraded software stack. For example, one significant area with improvements in newer releases is the availability of new User Experience tools, such as D2 and xCP 2.x, but also including the new Extended ECM (xECM) and Smart UI integrations available only in the newest releases of Documentum software.



### Planning the upgrade:

- Developing with the customer team a high-level direction for the upgrade path, including back-end server components as well as User Experience components.
- There may be effort required to leverage new functionality especially in terms of User Experience, but the investment can pay off dramatically in increased usage of the new systems and better compliance with documentation policies and procedures.



### Customization review:

- Many Documentum 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 User Experience offered by more up to date Client UIs. Alternatively, a move, for example, from WebTop to D2 as a primary user interface, may enable more customization to become configuration, with improvements to maintainability, enabling the customer to reduce the effort they need to remain current after the upgrade has occurred.

## Upgrade Assessment Report

After the workshop, the OpenText SME prepares an Upgrade Assessment Report, detailing the analysis and recommendations that came out of the workshop. A remote presentation of these findings will be made to the customer's team. OpenText works with the customer to identify next steps and agree upon possible ways in which OpenText Professional services can support the customer to achieve their goals.

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Connect with an Opentext Professional Services Upgrade expert at [www.opentext.com/upgrades](https://www.opentext.com/upgrades)

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