

# Expert guidance your way

Expert support for the scale you need—from advising and on-demand access to an end-to-end upgrade

## The Challenges

- **Strategically and securely planning/executing upgrades with minimal user impact**
- **Budget restraints, or a lack of available resources having in-depth solution knowledge**
- **Leveraging new features and functionality while maintaining system integrity**
- **A constantly changing IT landscape—whether it is new server hardware or upgraded end user operating systems, applications, browsers, and so on**

## The Results

- **Confidence and trust in proven upgrade strategy**
- **A range of options for expert guidance to meet your specific needs, strengthening in-house capabilities**
- **Reduced risk for large or complex implementations**
- **Stable, secure solutions with improved usability and performance**

It's a good idea to upgrade your Hyland solutions to the latest version at least every couple of years in order to take advantage of enhanced security, new and optimized capabilities across the product suite and improved performance.

But we understand that sometimes this is easier said than done. When it is time to upgrade, many of our customers engage our Upgrade Services teams to assist.

## Offerings

We can step in and perform the entire upgrade, or help with any phase.

### Upgrade planning and risk assessment

This service is appropriate when you have a trained system administrator capable of executing the upgrade and want an expert assessment that will uncover potential challenges. Together, we'll evaluate your current deployment, verify infrastructure plans and identify components, like scripting, that you should evaluate or re-implement in the upgrade process. This service can be a high-level review and planning exercise or a deep-dive review of custom API code and/or scripts used in your solutions. We also deliver a document with suggested tasks, outlining any concerns.

### End-to-end upgrade

Working with you to craft a strategy that best works for your needs, we'll upgrade or create your test environment and identify the appropriate upgrade strategy, plan and checklist. We'll support you in the testing phase, perform (or support) the production upgrade and provide post upgrade support. We'll also point out key new features and beneficial functionality, and provide training in areas such as database maintenance and general administrative tasks.

### Upgrade consulting

General upgrade consulting is available for those customers who have most aspects of an upgrade covered and merely want general guidance and assistance leading up to, and potentially assisting through, the production upgrade. Engage our experts through a single Upgrade Consulting Service engagement, or through our subscription-based On-Demand Services, where experts are available on a perpetual basis to your in-house team. With either type of engagement, you own the upgrade project as a whole; Hyland experts work with your team to assist and provide guidance for areas you determine.

### Staff Augmentation

In a Staff Augmentation service, one or more Hyland experts joins your team to assist with your upgrade initiatives. Staff Augmentation projects are managed completely by the customer and are typically time-bound rather than scope-bound. In this model, Hyland experts can fill a variety of gaps, whether centering on core software areas, business process configuration or even custom API integration.

**“The communication from Hyland ensured that we didn’t miss details or overlook possible problems early on, and our production upgrade was back up and running ahead of schedule.”**

- Karl Madsen, application analyst, Carleton College

### **Incremental vs. synchronous upgrade approaches**

Depending on your implementation and organizational requirements, we use the appropriate upgrade approach:

#### **Incremental, Parallel Upgrade Process (IPUP)**

This approach upgrades only a few components of a solution at a time, reducing the scope of risks associated with the upgrade. Both downtime and risk are reduced by deploying the components of the later version in parallel with the current version components. This parallel upgrade method allows users to have continued access to the legacy operational implementation. Optimal for larger, complex installs or when upgrading from several versions earlier.

#### **Synchronous Upgrade**

The entire upgrade occurs during one period of scheduled downtime, usually over a long night or off-peak weekend. Synchronous upgrades are often a preferred option for smaller or less complicated installations. For example, this option may be preferred for upgrades without a major OS or database version change or for implementations that do not have components, such as large WorkView Case Management installs, complex workflows, APIs or in-house code.

### **For additional information, contact your account manager or visit:**

[services.hyland.com](https://services.hyland.com) | [training.hyland.com](https://training.hyland.com)

### **Benefits and Features**

We understand that every customer solution varies, from the version(s) of software you are upgrading to the infrastructure, size, security requirements and SLAs of your solutions. Our experts are certified installers who specialize in upgrades and understand the best methods for upgrading your specific system. Engaging Upgrade Services to assist with your upgrades provides the following benefits and capabilities to your team:

#### **Reduced risk**

Enterprise upgrades are typically very high profile. Our upgrade experts understand what behavior to expect from the new software and can easily troubleshoot any issues encountered in the upgrade process. This minimizes the time and effort needed to execute the upgrade, including APIs that need to be fixed or disk groups that need to be redirected.

Hyland experts know what is required, work quickly and have the experience to minimize disruption to ongoing business operations during the upgrade process.

#### **Increased capabilities to accurately plan and execute upgrades going forward**

Following an Upgrade Services engagement, you’ll have a better understanding of your solution, as well as additional insight into enhancements or changes within your Hyland solution. We also encourage you to use our Upgrade Services as an opportunity for your system administrator and other IT staff to talk with Hyland experts about how to support the solution going forward—from change management processes to infrastructure monitoring, maintenance procedures, and resources on [Community](https://community.hyland.com) and [training.hyland.com](https://training.hyland.com).

For example, our on-demand training suite, Premium Subscription, offers comprehensive upgrade training, including tools like the Upgrade Adoption Kit. The kit guides system administrators through a key component to successful upgrades or solution expansion efforts: change management. It provides materials, templates and proven communication methods that ensure all levels of stakeholders in your organization understand the value of the upgrade and are enthusiastic participants.

#### **Acquire the best methodologies and learn the latest product capabilities from the experts**

We work side-by-side with you, sharing methodology honed over years of performing upgrades. This not only makes the upgrade process faster and easier, it also eases the burden of risk from your teams, promoting competence and confidence in their upgrade capabilities going forward.

Upgrade Services can be especially useful to new System Administrators, but even those with a lot of Hyland solution experience can gain value by working with our experts who have a wealth of knowledge, tools and resources at their disposal.