

Upgrade with confidence

Expert support for the scale you need—from advising, to an end-to-end upgrade

The Challenges

- **Strategically plan and execute upgrades with minimal user impact**
- **Organizational changes, a lack of in-depth knowledge of OnBase and your solution, or both**
- **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**
- **Reduced risk for large or complex implementations**
- **Expert guidance, education and training to develop your staff capabilities**
- **Stable, secure OnBase solutions with improved usability and performance**

It's no secret that it's a good idea to upgrade OnBase to the latest version at least every few years in order to take advantage of optimized features, improved performance and new capabilities across the OnBase product suite. And we know this is sometimes easier said than done.

When it is time to upgrade OnBase, many of our customers reach out to Hyland's Upgrade Services teams to assist. We understand that every customer solution varies, from the version of OnBase you are upgrading, to the infrastructure, to the size and use of OnBase. Our experts are certified OnBase installers who specialize in upgrades, and understand the best methods for upgrading your specific system.

Offerings

We are available to step in and help for any phase of an upgrade, from consulting to end-to-end upgrade services.

Upgrade planning and risk assessment

Our upgrade experts work with your team to evaluate your current OnBase deployment, verify infrastructure plans, and identify specific components, like scripting or custom code, that should be evaluated or re-implemented as part of the upgrade process. Depending upon your specific needs, this service can be a high level review and planning exercise, or a deep dive review of custom API code and/or scripts used throughout OnBase.

This service is appropriate when you have a trained system administrator capable of executing the upgrade but want the assurance there are no foreseen issues. This level of service includes a deliverable document outlining suggested tasks and/or a briefing on any concerns.

End-to-end upgrade

We'll upgrade or create your test environment, identify the appropriate upgrade strategy, plan and checklist, support you in the testing phase, perform (or support your needs for) the production upgrade, as well as provide post-upgrade support. In the end, we'll work with you to craft a strategy that best works for your solution and your organizational needs.

We'll also point out key new features and functionality that may be beneficial, as well as provide additional training and guidance in areas such as database maintenance or general administrative tasks.

Upgrade consulting

This service is for those customers who have most aspects of an OnBase upgrade covered and merely want general guidance and assistance leading up to the upgrade. Many of our customers want a Hyland consultant to work side-by-side with their team during the production upgrade, supporting the strategy and approach.

“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 upon 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 number and scope of risks, and easing future product deployments and upgrade planning. Downtime is reduced by deploying the components of the later version in parallel with the current version components, while providing continued access to the legacy operational implementation. Optimal for larger, complex installs or when upgrading from several versions earlier.

Synchronous Upgrade

Entire upgrade occurs during one period of scheduled downtime, usually over a long night or off-peak weekend. Often a preferred option for upgrades coming from a more recent version of OnBase, or a smaller or less complicated installation. For example, upgrades without a major OS or database version change, or components such as large Workview/case management installs, complex workflows, APIs or in-house code.

Why Hyland Services?

- We provide highly trained, certified professionals with the highest commitment to customer service and satisfaction
- We focus on developing your staff, creating technical competence and confidence working with the product and your deployed solutions
- We are flexible in our ability to provide services, remotely and on-site, for as long as you need us
- We leverage the collective experience of the OnBase community to identify and apply best practices to the support of your deployed solutions

Benefits & Features

Reduce 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 OnBase upgrade, including APIs that need to be fixed or disk groups that need to be redirected.

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

Accurately plan and execute upgrades

Following an Upgrade Services engagement, you’ll have a better understanding of your solution, as well as additional insight into enhancements or changes within OnBase.

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 to maintenance procedures. Our staff can orient them to technical material and programs available to OnBase end user professionals both on Community and through our Education Services programs.

Learn by working side by side with 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.

Engaging Hyland for Upgrade Services can be especially useful to new OnBase Administrators, but even seasoned OnBase Administrators can gain value by working with our experts who have a wealth of knowledge, tools, and resources at their disposal.

Our Mission

Our mission is to be the best ECM solution provider in the world with whom to partner. To that end, we are firmly committed to helping customers successfully operate, maintain, modify and extend their OnBase solutions. For more information, contact your account manager or visit [OnBase.com/Services](https://www.onbase.com/services).