SYNTERGY

Upgrade from Content Server 9.7x to 10

in one step with no downtime

DATA MOVING >>> Where You Need It

Open Text – Syntergy Webinar

Presented by:

Evan Wheeler & Martin Black

OPENTEXT PREMIER PARTNER

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Introductions

Martin Black

Director of Sales

- 9 years with Syntergy
- 12 years at Unisys Corporation prior to joining Syntergy
- Brought Open Text into Unisys as a Partner
- Managed Open Text partnership at Unisys

Evan Wheeler

Product Manager

- 6 years with Syntergy
- Previously an independent consultant and developer for many Open Text customers
- Worked for Open Text as a Quality Assurance engineer and in their Performance & Scalability lab
- Created the Open Text Performance Analyzer product

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Corporate Profile

SYNTERGY

- 14 Years Experience Serving Global 2000 Customers
- Headquarters in San Diego, CA
- Key Executives and Engineers from Open Text and other Content Management leaders
- Well Funded and Profitable
- Distributed Staff throughout USA/Canada/Europe
- Open Text Partner, Gold Microsoft Partner & ISV, Metalogix Partner.
- Provider of more than 20 Enhancement Products for Content Server
- Experts in Upgrades/Migrations, Content Moving and Replication
- Provide Consulting, Training and Support for our Technologies and Products

OPENTEXT PREMIER PARTNER

Microsoft Partner
Gold Portals and Collaboration
Gold Web Development

Metalogix

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Customers Worldwide

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Customers

SYNTERGY

National Energy Board
Office national de l'énergie
NATIONAL ENERGY BOARD
OFFICE NATIONAL DE L'ÉNERGIE
Canada

LOCKHEED MARTIN

GENERAL DYNAMICS
Advanced Information Systems

CapitalOne

Unilever

DEPARTMENT OF THE NAVY
UNITED STATES OF AMERICA

Desjardins

WELLS FARGO

ConocoPhillips

Lawrence Livermore
National Laboratory

STORAGETEK

Philip Morris U.S.A.

MERCER

U.S. AIR FORCE

sasol
reaching new frontiers

VISA

EASTMA
www.eas
Eastman Chemical Co

hp
invent

MARSH

BARRICK

Husky Energy

Welcome
LosAngelesAFB.com

AXA

NORTHROP GRUM
DEFINING THE

Deloitte.

AMGEN

Genentech
A Member of the Roche Group

QUALCOMM

Content Server Modules

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Workflow Steps
Change Agents Defaults
Replicator Content Mover
Inbox Proxy
Live Mail
Replicator
LiveSync
Workflow Publisher
Document Archive
Workflow Escalation
Live Pages
Soft Documents
Bulk Loader
Route for Review
Extranet Secure
Single Sign-On
Password
Command Processor

Livelink ECM & CS10

Enhanced Livelink modules enables a seamless experience for employees, customers and partners.

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Support Options

Key Feature	Standard North American	International	Premium	Premium 7x24
Coverage Hours	9am-5pm EST (M-F)	9am-5pm GMT (M-F)	4am-8pm EST (M-F)	7x24x360 coverage
Response Times	48 hours	48 hours	12 hours	4 hours
Number of Named Contacts	2	2	4	4
Dedicated telephone “hotline”				☑
Dedicated support site with alerting capability of new releases	☑	☑	☑	☑
Includes all minor and major product releases/upgrades	☑	☑	☑	☑
Utilizes web technology for investigation of customer environment (if required)	☑	☑	☑	☑
Unlimited email tickets, telephone call center	☑	☑	☑	☑

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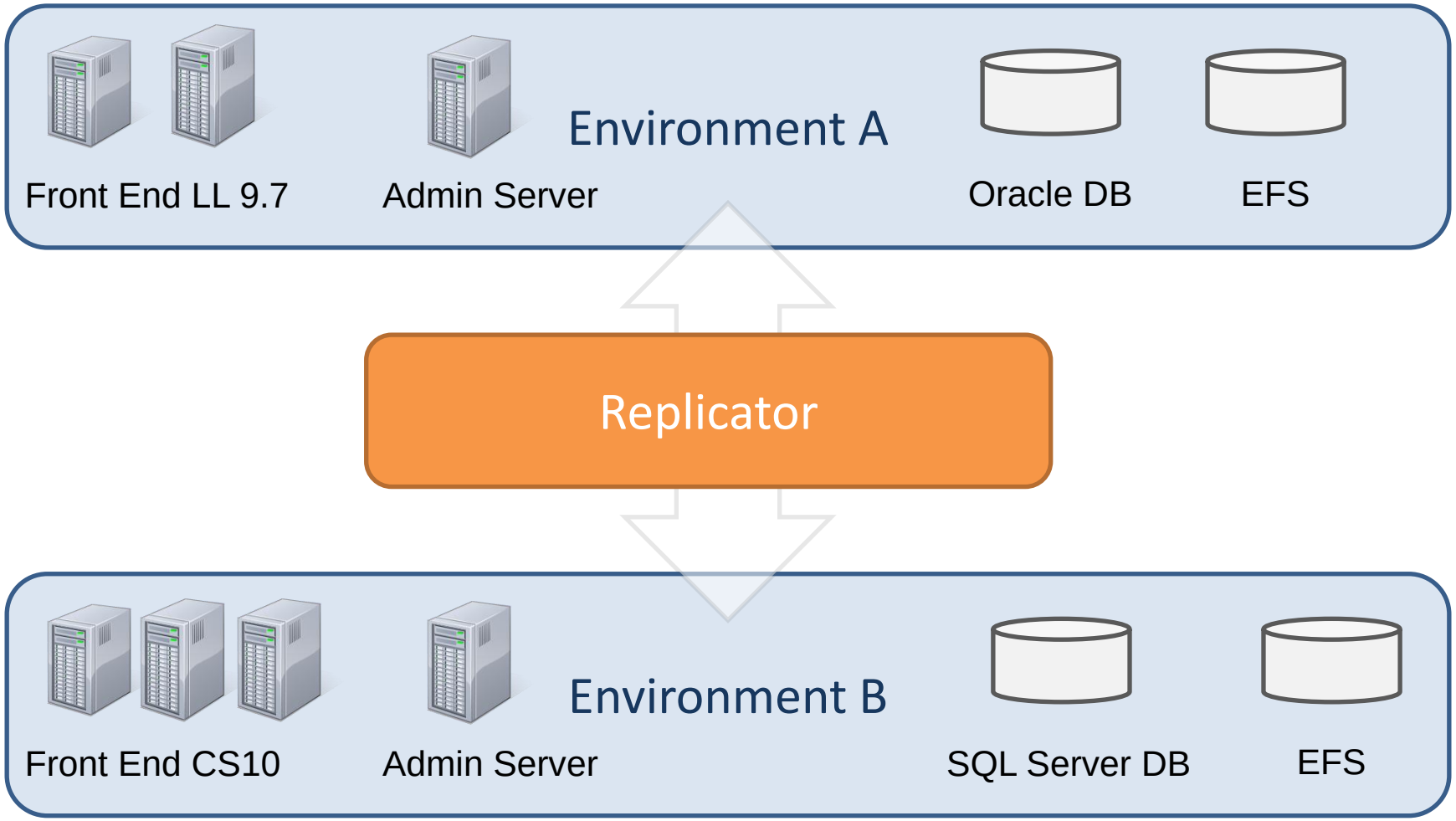
Replicator Overview

- Replicator is a LL/Content Server module
- Installed in two or more separate environments
- Users and groups synchronized during initialization
- All or specific content synchronized between environments
- Subsequent additions/changes to synchronized content are replicated
- Bi-directional and one-way replication supported
- Cross-version replication supported (9.2 - CS10)*

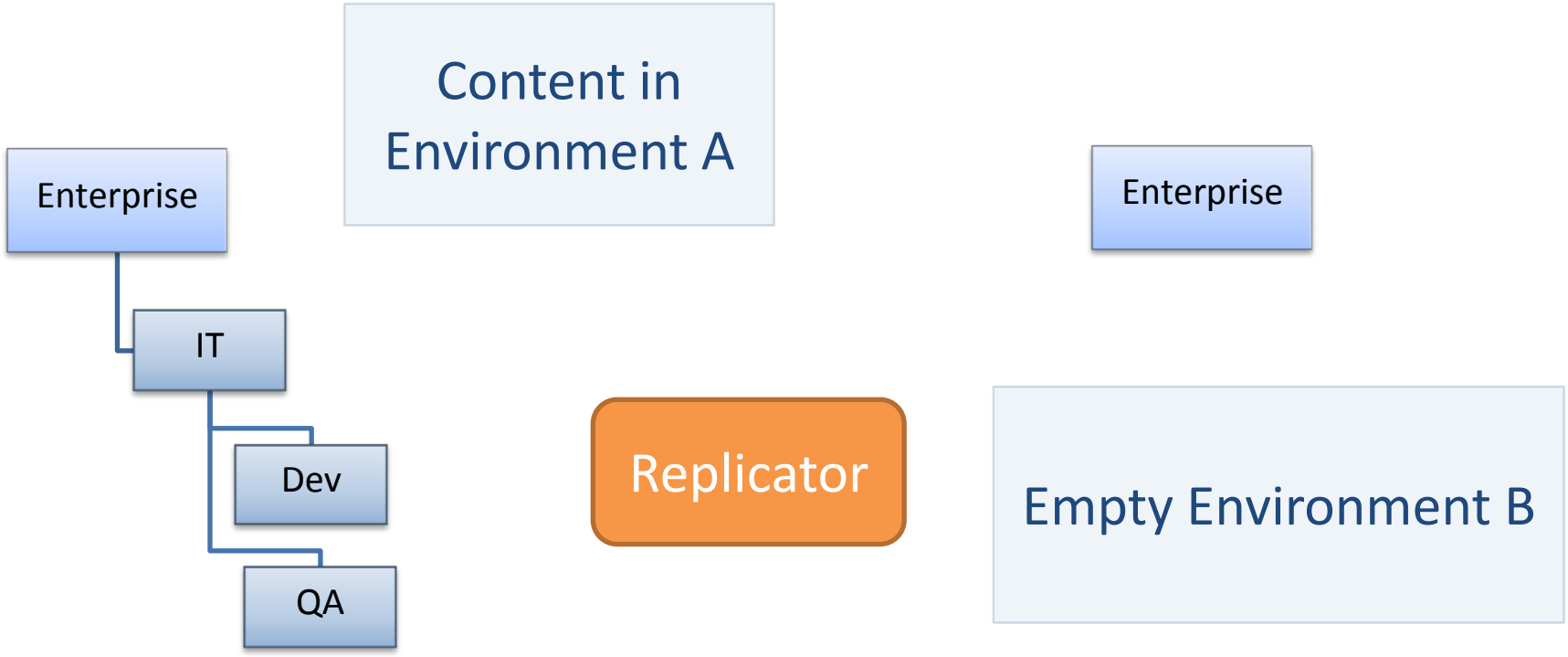
Replication Scenario



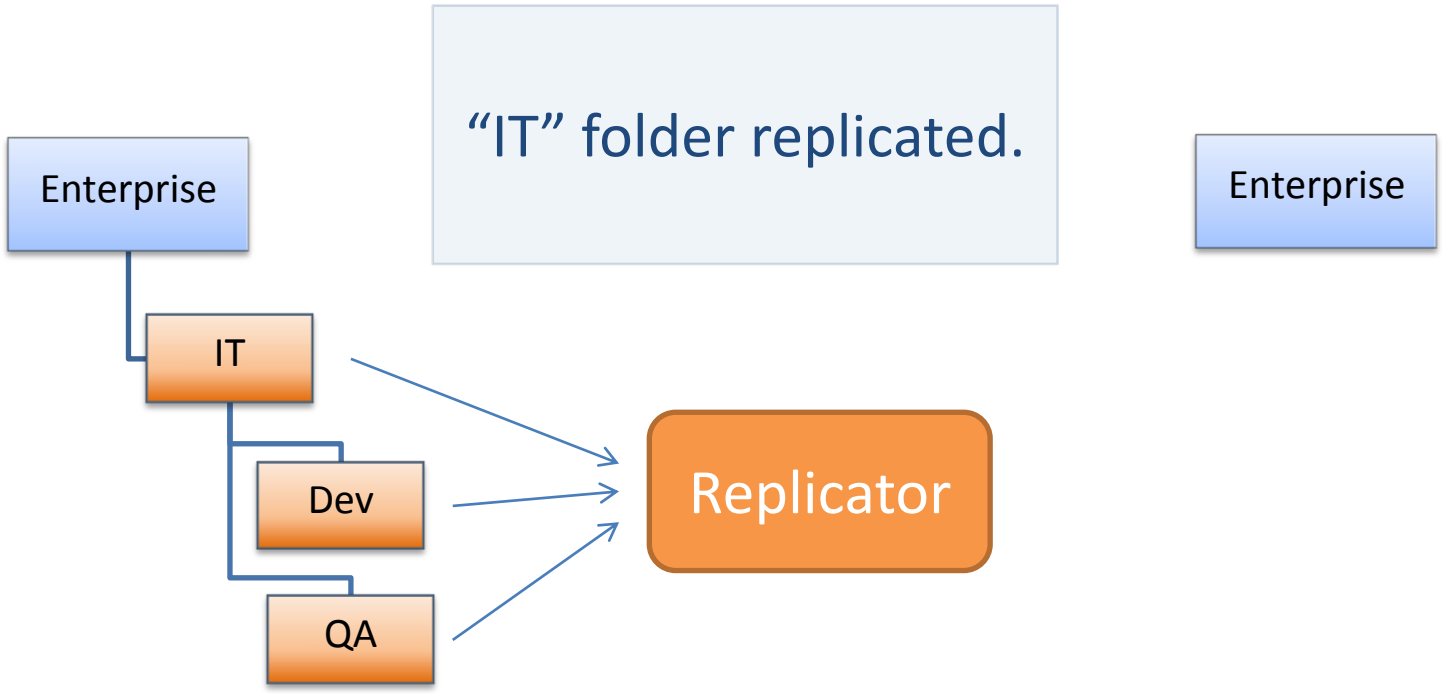
Replicating Content

- Replicating a container automatically replicates its child objects
- Replicated objects stay synchronized as long as replication is enabled
- Replication can be configured on the Enterprise or any object below
- Content can be “re-parented” during replication to reorganize folder structure

Replicating Content



Content Replication



Environment A

Environment B

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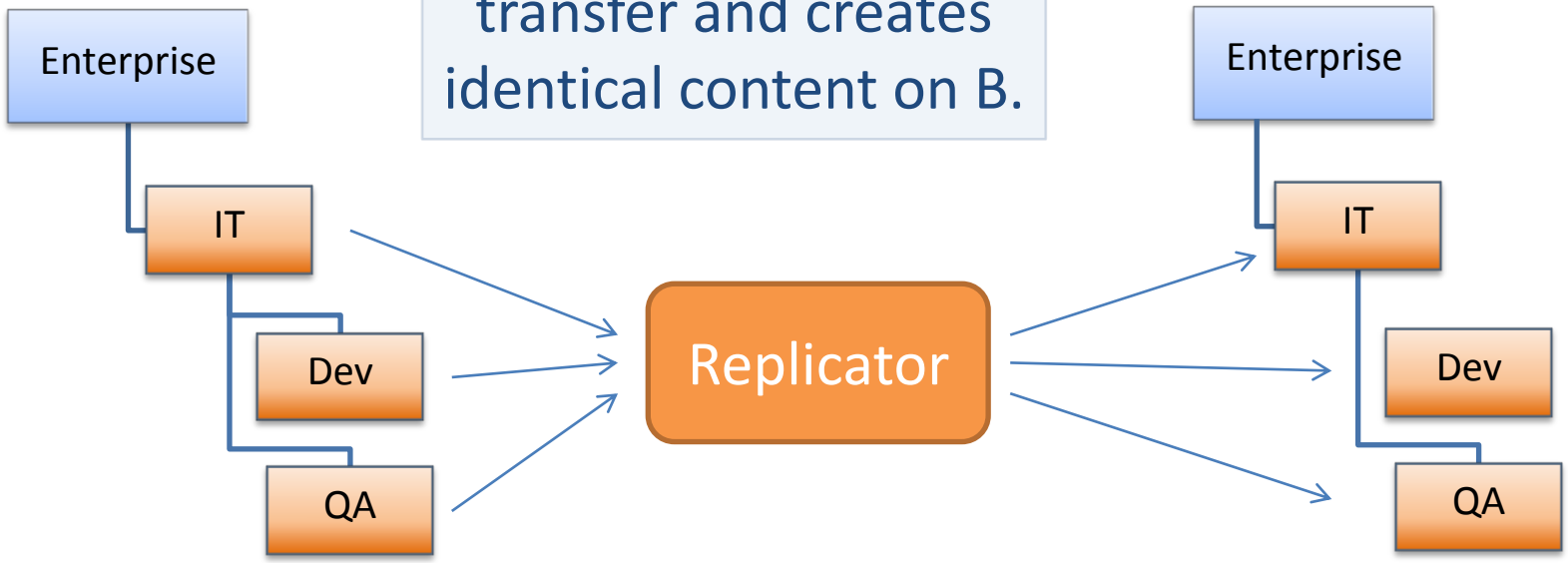
Content Replication

Replicator handles transfer and creates identical content on B.

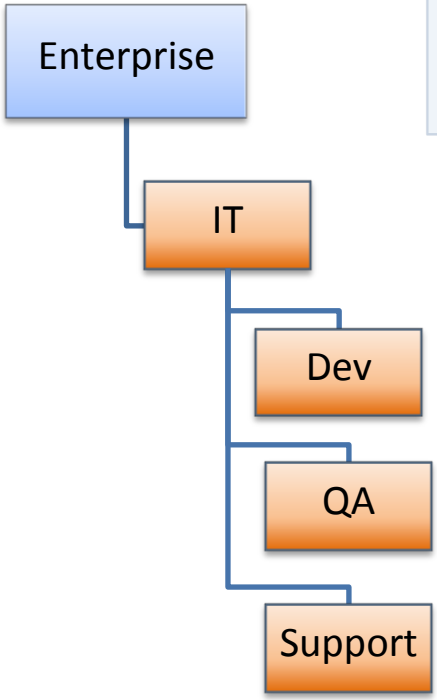


Environment A

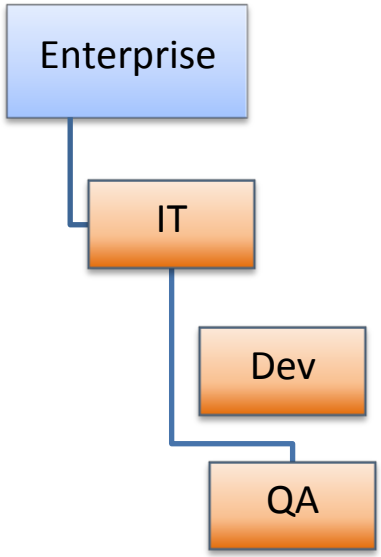
Environment B

Content Replication

Support folder added under replicated “IT” folder.



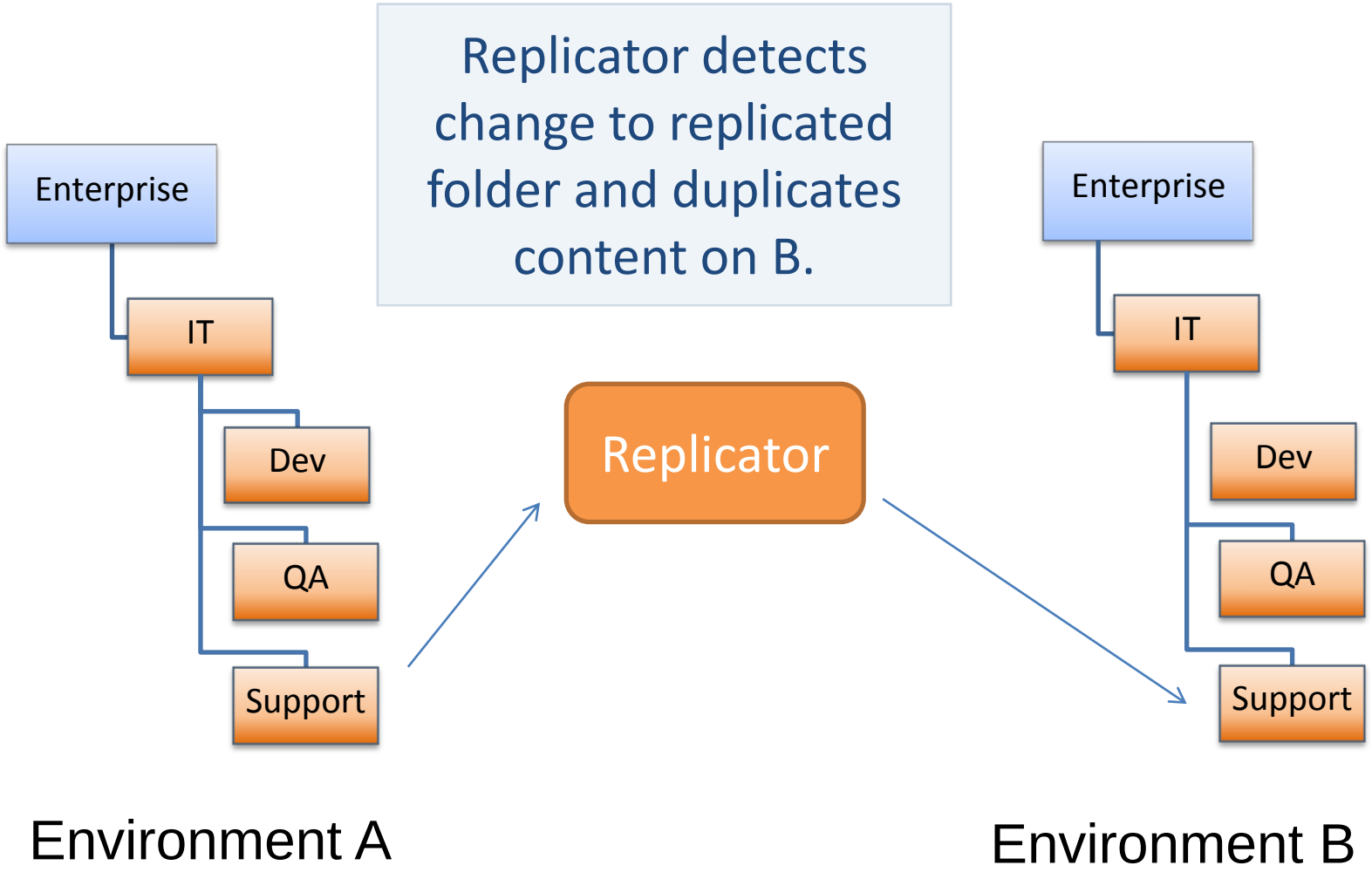
Replicator



Environment A

Environment B

Content Replication



Supported Object Types

- Support for basic object types and many optional modules:
  - Documents
  - Compound Docs
  - Folders
  - Categories/Attributes
  - Tasks
  - Projects
  - Communities of Practice
  - Workflow & Forms
    - Maps
    - Templates/Views
    - Forms
    - SQL Storage
    - Multi-server workflow execution and step completion

Efficient Transport

- HTTP/HTTPS used for all communication
- No special firewall requirements
- Meta-data and file content is compressed before transfer
- Flexible options for file transfers allows Replicator to operate on unreliable or slow connections
  - Export file size is configurable
  - Compressed export files can be chunked and transferred for increased reliability
- No network activity unless content changes

Efficient Activity Detection

- Activity is detected immediately when changes occur
- Content Server API callbacks used when possible
- Light-weight database triggers used when needed
- Changes are queued and packaged on a configurable schedule
  - Control how often activity is packaged
  - Control how frequently activity is delivered

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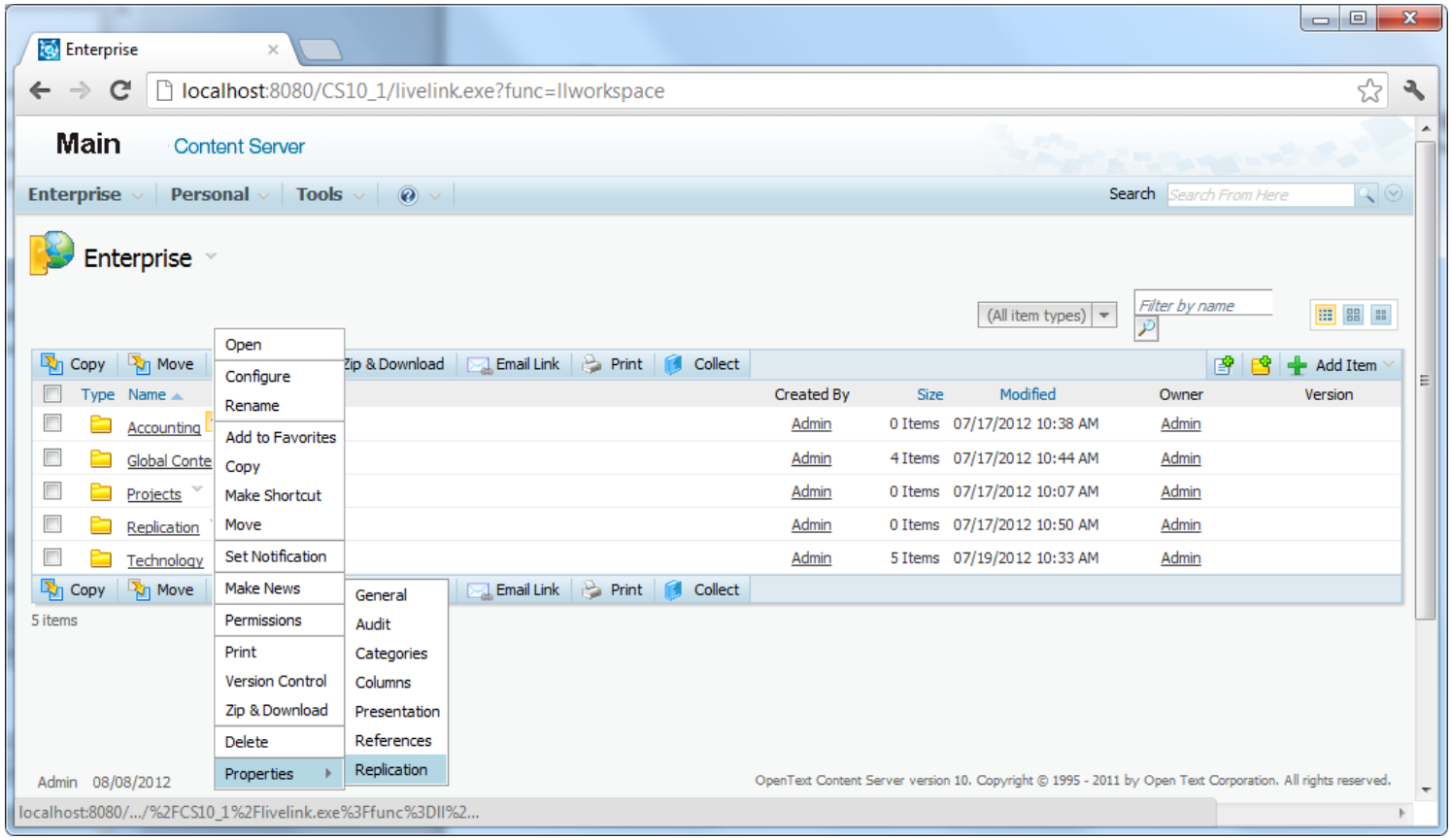
Replicating Content



Objects in Content Server that support replication have a Replication properties page

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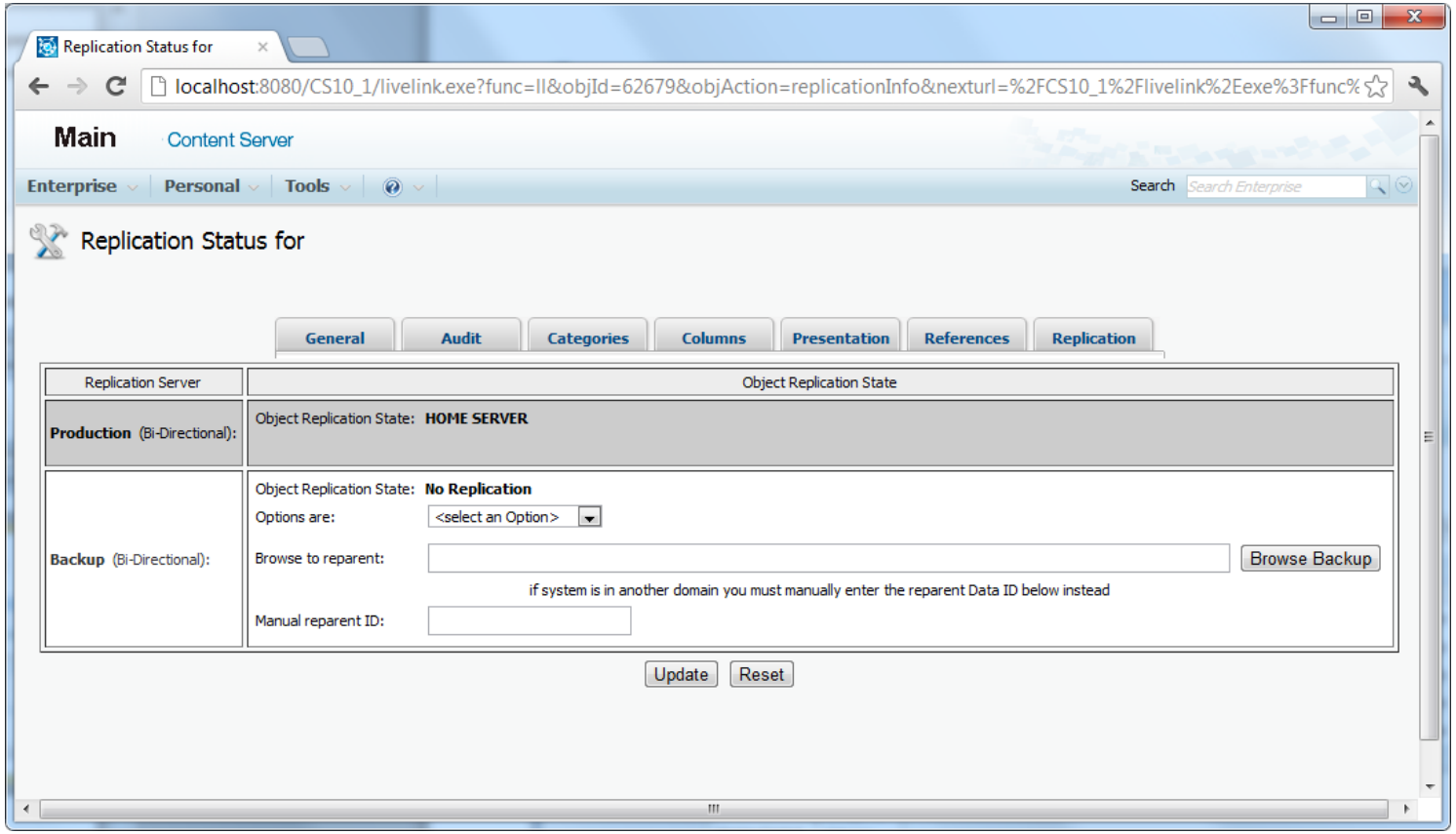
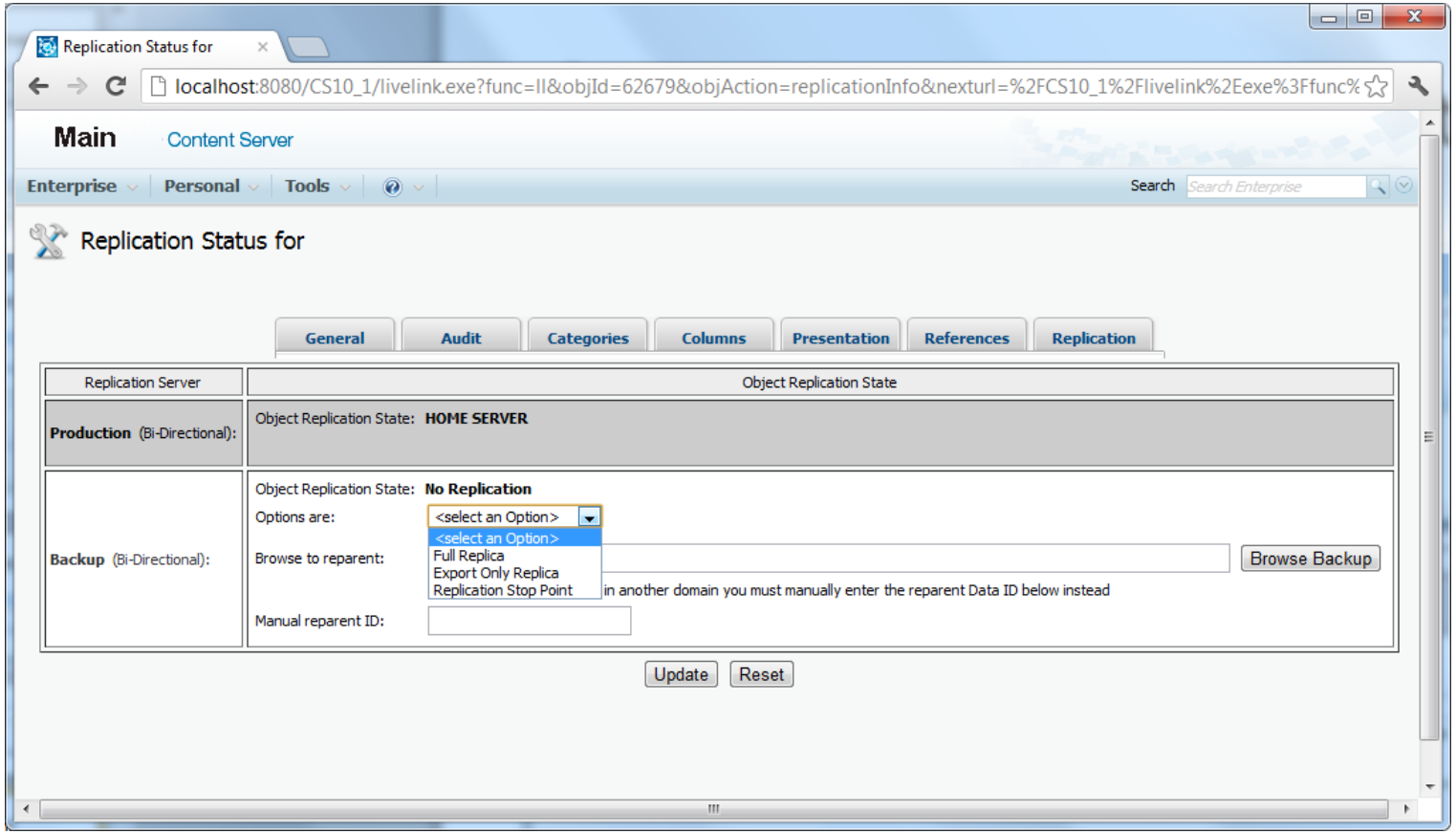
Replication Tab



Replication state can be configured for each object

Changing Replication State



Replication states: Full Replica (bi-directional), Export Only Replica, or Stop Point

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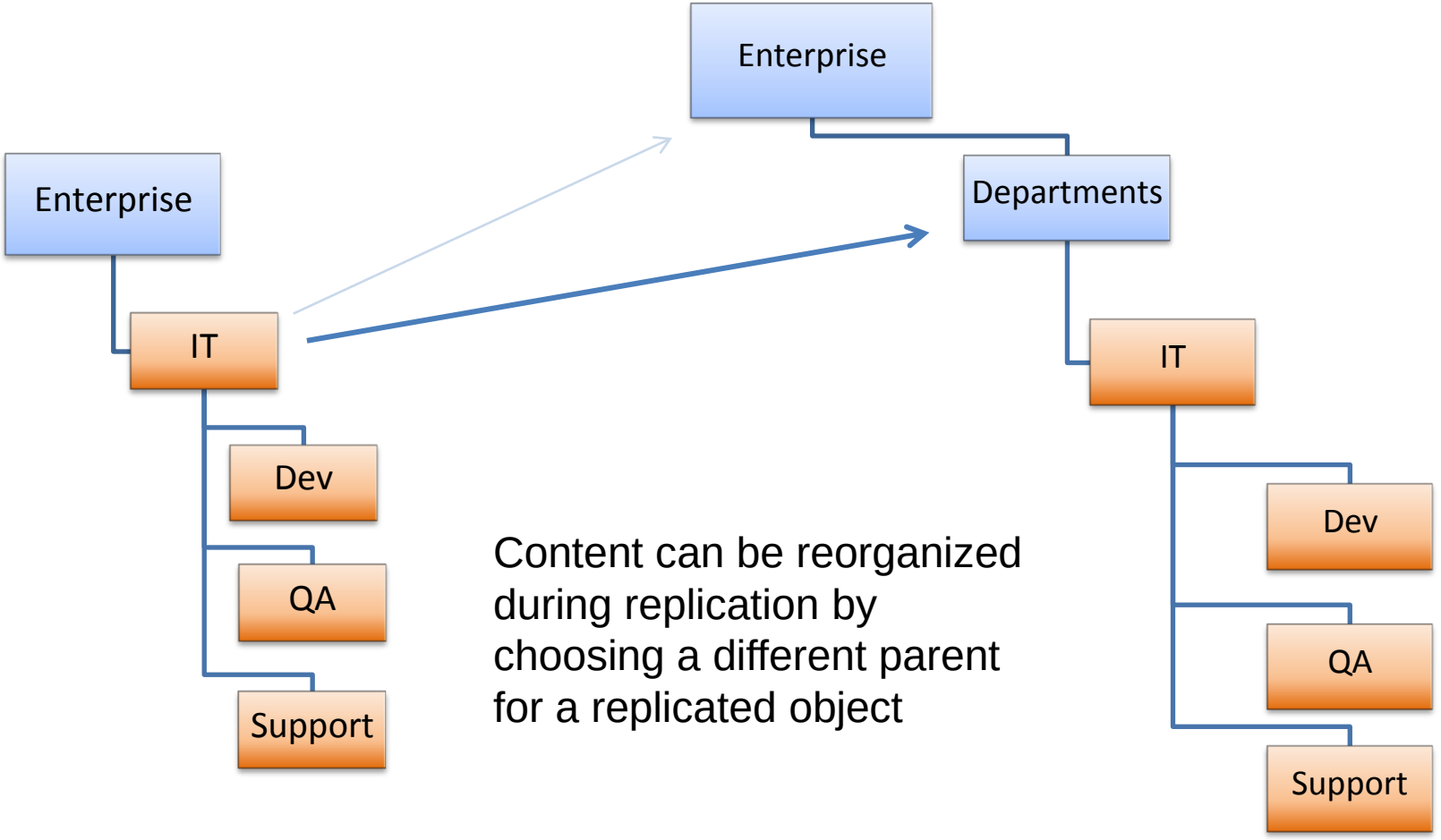
Re-Parent Options



Content can be reorganized during replication by choosing a different parent for a replicated object

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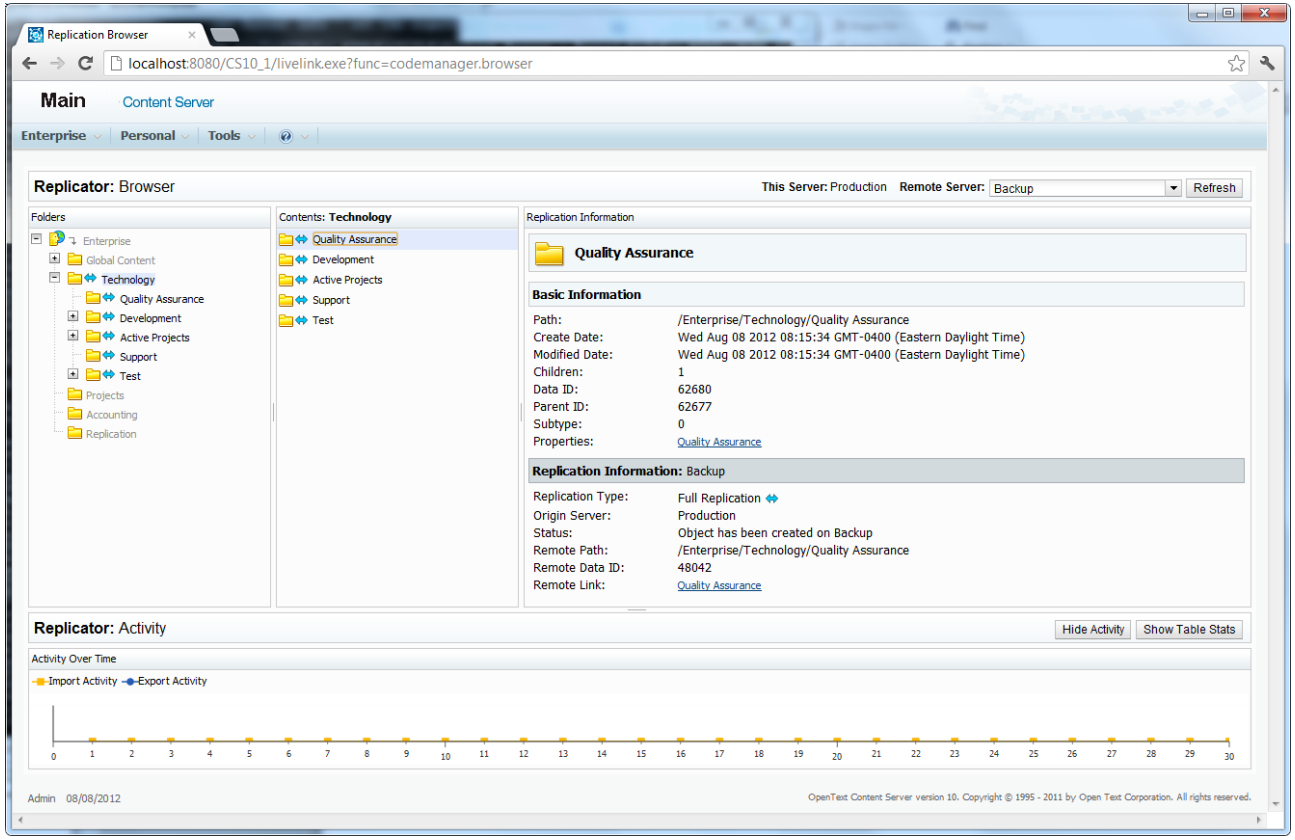
Replication Browser



All replicated objects can be easily displayed using the Replicator Browser

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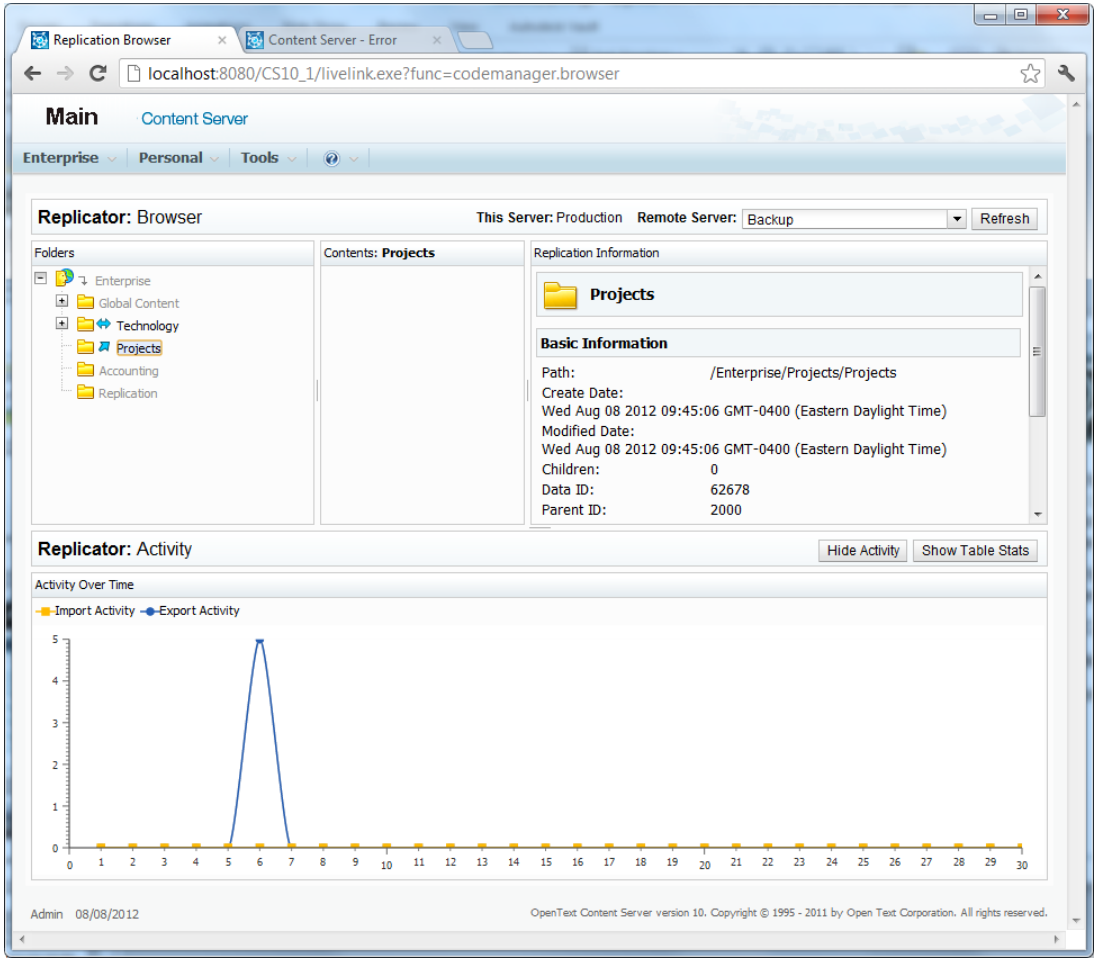
Real-time Information



Built-in dashboard displays import and export activity in real-time

Upgrades Made Easy

- Standard upgrade to CS10 can be very complicated
  - Many steps must be performed during upgrade
  - May need to convert to UTF-8
  - Upgrade must occur during maintenance window
  - Upgrade complexity and time can mean production outages or tough go/no-go decisions
  - Testing must be done during upgrade window or during test upgrades
  - Upgrade from versions prior to 9.7.1 not directly possible

Standard Upgrade Steps

- Perform UTF-8 conversion if using Latin-1 (non-trivial)
- If Livelink version < 9.7.1, upgrade to Livelink 9.7.1 (non-trivial)
- Build Content Server 10 environment
- **Production outage begins**
- Take database snapshot and transfer to new system
- Image EFS and transfer to new system
- Copy search index (unless rebuilding)
- Update database
  - Point to new EFS location via SQL
  - Other changes - recycle bin, etc.
- Perform upgrade
- Post-upgrade steps (rebuild or restore index, etc)
- Test (if time remains)
- Change DNS to point to CS10
- **Production outage ends**
- All steps should ideally happen twice for upgrade testing

Replicator Upgrade Steps

- Build Content Server 10 environment
- Install Replicator module in LL (9.2 to 9.7.1) and Content Server
- Initialize replication
- Wait for systems to synchronize
- Test
- Change DNS to point to CS10

- No production outage
- Both systems can be live simultaneously

Upgrade with Flexibility

- Upgrade directly to CS10 from 9.2, 9.5, 9.6 or 9.7x
- No need for production outage or large maintenance windows
- UTF-8 conversion is automatic if necessary
- Testing can occur as system is synchronizing
- Consolidate or split environments while upgrading
  - Move multiple environments to one large CS10
  - Split large system into multiple smaller systems during upgrade
- Modify storage or DB as part of upgrade (switch storage providers, change DB platform, etc.)
- Built-in options for audit cleanup and version cleanup

A Few Upgrade Details

- Search index is built during replication so index migration is unnecessary
- Replication may take longer than normal upgrade in some cases but does not require production outage
- Replicator does not support all optional modules
- Custom modules may need custom migration

Alternate Upgrade Method

- Build duplicate 9.7.1 environment
- Copy EFS, search index and database
- Initialize replication between duplicate environments
- Disable Replicator outbound traffic
- Perform upgrade to CS10 on duplicate system
- Enable replication traffic and changes will be synchronized
- Switch DNS entries

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If you are interested to learn more about Syntergy's products, please contact Martin Black at mblack@syntergy.com.

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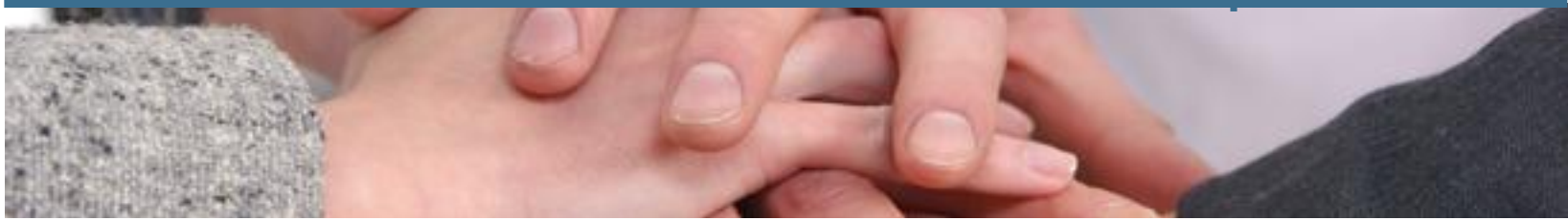
questions



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