

7 WAYS TO MAKE YOUR UPGRADE EASIER (AND MINIMIZE BUSINESS RISK)

Upgrading your technology solutions can seem like a daunting task, but doing so is vital to realizing the return on your investments. Regular software upgrades ensure that your organization benefits from new features, functionality and a better user experience.

So how can you reap the full benefits of upgrading while mitigating business risk?

Here are seven ways to ensure an effortless, pain-free upgrade.

1

Communicate, communicate, communicate

A smooth upgrade begins when everyone knows it is coming. Make sure both business and technical stakeholders understand why the organization is choosing to upgrade and give them a voice in the process.



Business stakeholders

+



End users

+



Clear communication

=



Smooth upgrade

2

Get the lay of the land

Get a better understanding of your software needs by communicating with your stakeholders and end users. Getting the lay of the land helps you determine both the scope of your project and which upgrade path is best.

What are my overall upgrade needs?

Who's involved?

3

Choose your upgrade path

There are two ways to upgrade your content management solution:

Traditional upgrade

The all-at-once method is fast, but could create downtime if there's an issue with the newer release.

Faster, but carries more risk

Incremental parallel upgrade

A phased approach reduces potential issues and allows for more flexibility, but requires more time.

Slower, but provides less risk and greater flexibility

4

Know your slow time

Lower your risk by upgrading during your organization's slow time.



Manufacturing — a planned plant shut down



Educational institution — summer hours

5

Don't forget third-party integrations

If your solution integrates with third-party software, find out if there are plans to update these to newer versions — and make sure they are compatible with your upgrade.



6

Test, test and test again

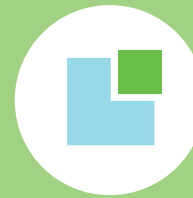
Having a test system as part of your upgrade strategy is a must



Mirror your production system to test your process



Modify scripts without affecting production



Develop additional modules with little risk



Conduct user acceptance testing prior to go-live on a process or a new module

7

Utilize vendor support

Take some time to understand how your software vendor can help you with the upgrade. From detailed online resources to expert guidance on-site, Hyland offers support throughout the process.



Expert advice during the upgrade



Documentation to walk you through the process step-by-step

Hyland Upgrade Services

Our Upgrade Services team is here to assist you every step of the way during the upgrade process, helping you realize the full value of your software investment. To learn more, contact your account manager or visit us at [Hyland.com/Services](https://www.hyland.com/Services)

And to explore how moving your solution to the Hyland Cloud can even further simplify upgrades while providing you with faster access to new capabilities, visit [Hyland.com/Cloud](https://www.hyland.com/Cloud)

Hyland®