

Upgrading Documentum to Increase Efficiency and Stability



Results and Benefits

At the end of the project, this complex regional power company had a newly configured environment on up-to-date technology that delivered multiple immediate benefits:

- ✓ Increased reliability and stability in the system
- ✓ Fewer number of user-initiated support cases
- ✓ Less overall downtime of applications
- ✓ Reduction in the number of issues flagged during security audits
- ✓ Ability to obtain support from OpenText for any current version issues

They also have a complete development system that allows them to test and rollout any new customizations and upgrades required in the future.

On this project, our client was a regional utility company that provides electricity and energy services in the central United States. Their mission is to produce and deliver electricity as reliably, economically, and environmentally responsibly as possible.

Challenge

In early 2022, a regional power company was experiencing a challenge we have seen frequently over the years. First, they had multiple OpenText™ solutions that were out of date and were no longer supported, and their internal resource with knowledge of the Documentum systems had left the company. Without this in-depth historical knowledge, they were starting to experience reliability and stability issues. While the remaining staff were talented, their lack of system experience was creating challenges maintaining the system and preparing for an upgrade. They also did not have a development environment to work with, making any servicing or changes even more challenging. As they were planning to integrate additional 3rd party solutions into their environment, they realized it wasn't clear if newer solutions would be able to interface with their older products. It had come time to address these challenges that were hindering their business initiatives and impacting their company mission.

Solution

The first step for the fme and our client's IT team was to collaborate in a series of comprehensive interviews with users and managers to understand and clearly define the challenges of the current system. fme also conducted a detailed analysis of their complete environment. It was vital to have a detailed understanding of the current state as well as current issues and future requirements in order to create a project plan.

The next issue to address was there was no non-production environment available. This made testing the upgrade process and confirming existing customizations difficult.

To address this challenge, fme created a separate copy of the production environment, a "clone", on new infrastructure. The upgrade process was executed against this "clone".

The benefit of this approach was that since the upgrade was being performed against real production data, any possible issues were encountered before the “real” upgrade of production. In fact, during this step fme’s technical team discovered bugs with the existing system that needed to be addressed. Once they were resolved, the teams had a complete Proof of Concept (PoC) environment to use for testing going forward.

fme then re-executed the upgrade process against the “clone” as a “dry-run” and reapplied all the required updates in the PoC environment. The process was documented in detail and a full complement of tests and reviews were completed to ensure all components were working as expected.

Once the process was completely verified and documented, fme and the client’s IT team re-utilized the PoC environment once again to perform the “real” Production upgrade. This was done by using the docbase clone approach to copy business data into the new production environment at the database/filesystem level. This simplified the move as no formal ‘migration’ process, tools, or mapping was required. Additionally, fme utilized our proprietary dqMan Documentum administration tool to accelerate and streamline interaction with Documentum Content Server. Another benefit of using the “clone approach” was that there was always a fallback recovery position to the original production environment should any issues be encountered along the way.

Finally, fme created a new non-production environment for the client team to use for future development and upgrade activities.

Throughout the project, fme worked with the client’s internal IT team to provide practical experience working with the updated system. We also provided a basic System Administration training course tailored to specific company support topics.

Technology

In this project, fme and our client’s team worked together to upgrade several products within their environment:

- Documentum Content Server v7.2 to v22.2
- Documentum xPlore v1.5 to v22.1 (Full Text Indexing)
- Documentum Webtop v6.8.0 to v16.7.9
- Documentum Administrator v7.2 to v22.2
- Microsoft SQL Server v2012 to v2019

Additionally, the following former TSG products are integrated with the Documentum environment and were confirmed to be functional after the upgrade:

- OpenAnnotate / OpenContent used by other client applications as a read only PDF viewing mechanism.
- OpenMigrate used on the server side to move content and meta data between Documentum Content Server and other applications on a periodic basis.

Conclusion and next steps

In the end this entire project was completed on-time and under budget, including patching unexpected bugs in the original system. Our client is now planning additional application modernization in a longer-term roadmap, as well as considering fme’s managed services to monitor and maintain the system going forward.

Visit www.fme-us.com for more details on our services and solutions.

»fme’s team were always available and approachable throughout the project, and the technical team’s knowledge and insights were a great asset to overcome our challenges.«

System Supervisor, Internet Technology