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EMPOWERMENT TALK TRACKS

SESSION 1

Migrating from NOW to SmartCOMM™

Joseph Gionta, Manager, Professional Services
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MIGRATING FROM NOW TO SMARTCOMM™

EMPOWERMENT TALK TRACK

Joseph Gionta
Manager, Professional Services



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HOW DO I GET FROM HERE TO THERE?

- 1 Professional Services Analysis
- 2 Project Planning
- 3 Execution
- 4 Moving Forward



THE FIRST STEP IS ANALYSIS



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UPGRADE ANALYSIS PROCESS



Kickoff

SC Sales Team discusses SmartCOMM™ Upgrade Potential with the customer



Discussion

SC Professional Services conducts an upgrade discussion with the customer



Requirements Analysis

Customer fills out Requirements Analysis with the help of PS



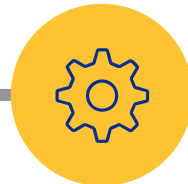
Review

PS reviews Requirements Analysis with the customer and finalizes the document



CMS Analysis

PS collects and reviews the customer's CMS for known items for updating



Gap Analysis

PS creates a Gap Analysis document to highlight areas of change



Upgrade Proposal

PS creates an Upgrade Proposal document that will form the basis of a future SOW



Discussion

SC PS and Sales delivers a short presentation to the customer regarding the Upgrade Proposal

THE NEXT STEP IS PLANNING



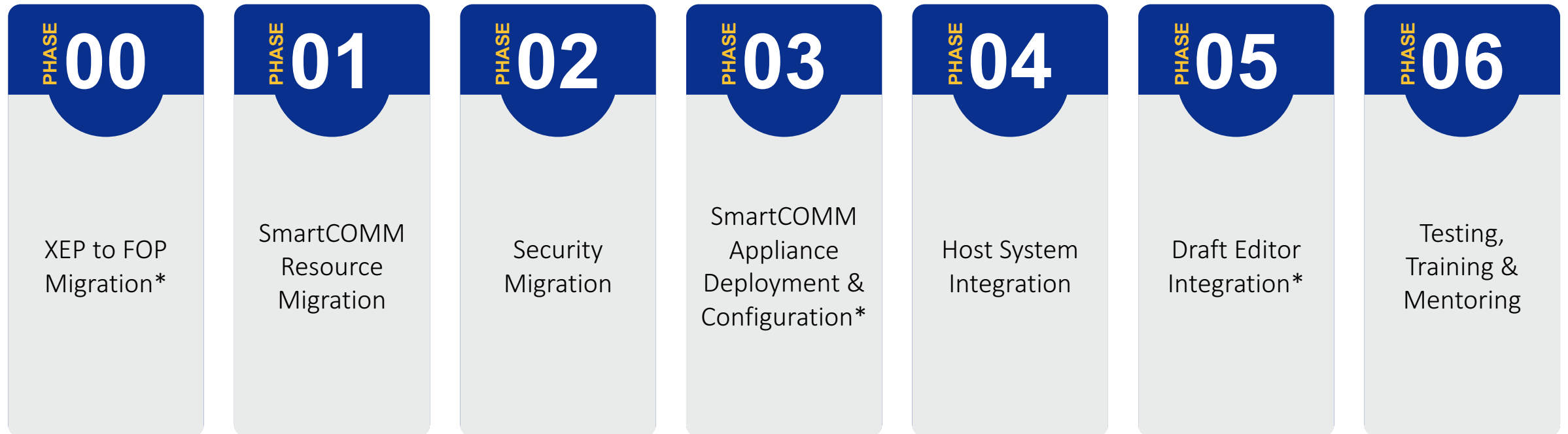
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PROJECT PHASES

The Upgrade Proposal is usually broken into the following sections:



* if necessary

DECIDING ON TASK ALLOCATION



Each phase in the Upgrade Proposal has a list of tasks. The customer determines the tasks they wish to accomplish and leaves the rest to SC PS Team.

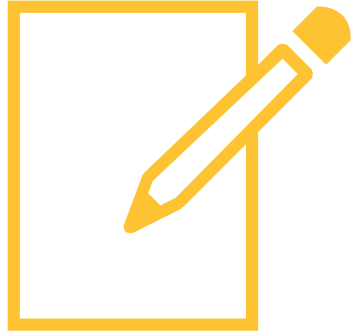
Typical Tasks Allocated to the Customer

- Export and import of resources from NOW to SC
- Make revisions to templates based on Unit Testing
- Modifying Host System Integration to use RESTful Webservices
- Modifying Host System Integration to use Draft Editor
- Regression Testing, Integration Testing, System Testing, and User Acceptance Testing

Typical Tasks Allocated to Smart Comms PS

- Recompile OP Plugins and validate functionality
- Update Batch Config and OP Plugin to use new Appliance paths
- Configuring SSO
- Configure Groups, Users, and Roles
- Documenting Operation Procedures

PROJECT PLANNING FOR NOW2SC



The SC Professional Services team will work with you on an SOW for any tasks you'd like us to take on. Once agreed upon, a project plan utilizing the previous project phases is defined.

Types of Resources Needed on the Project

- System Administrator for your current NOW implementation
- Developer to change integration code
- Project Manager to oversee project and ensure on-time and on-budget delivery
- QA Team to run regression testing and ensure communications look as expected
- Template Authors to fix any issues found during testing

THE THIRD STEP IS EXECUTION



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COMMON CHANGES MADE

During your migration to SmartCOMM™, certain resources are commonly updated

OP Config

Change output location to point to shared file server, update reference to fop.Xconf



Fonts

All fonts uploaded to CMS and fop.xconf file updated to point to new location

Batch Config

Updates to folder locations for output directories

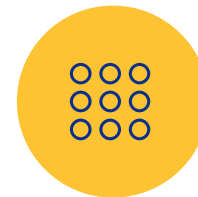


Templates

Replace Dynamic URL with External Content Link, repair any defects found during testing

WebDAV

All resources in WebDAV should be uploaded to the CMS



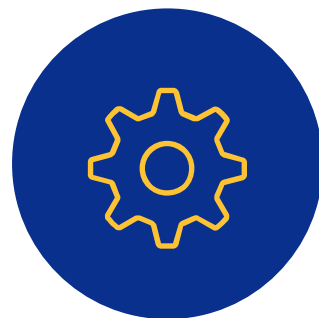
Layouts

Modify th:/// protocol to use cms:///

LESS INFRASTRUCTURE



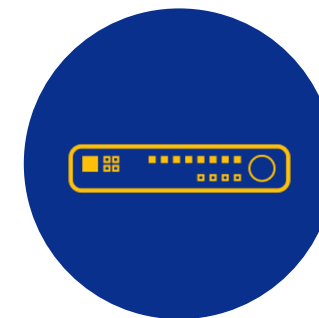
Tenancies are created automatically by our Support Team



For those utilizing our Hybrid Approach, the VM or Docker Appliance needs to be deployed and configured



Hybrid approach also requires a shared filesystem across all Appliances



For On-Demand and Interactive Use Cases in a Hybrid deployment, a load balancer is needed in front of the Appliances

TEST, TEST, TEST



The majority of time spent on NOW2SC projects involves testing.

Regression testing all of your templates may be time consuming, but is a necessary step.

Tools for Comparing Output are Extremely Helpful

- DiffNow
- DiffPDF
- Adobe Acrobat
- WinMerge with xdocdiff plugin
- Inet PDFC

THE LAST STEP IS GLORIOUS

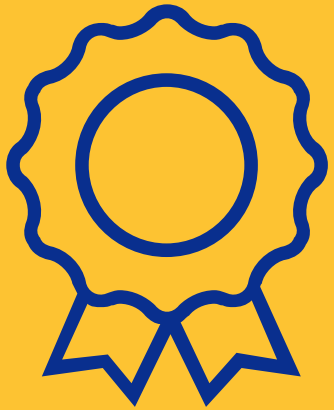


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CONGRATULATIONS!



At this point, you've completed your migration. Go forth and communicate with your customers!

Maintaining your SmartCOMM™ system is much easier than your **NOW** system.

- Automatic tenancy upgrades
- Easy appliance updates with 1 button
- Simple appliance folder structure of input, output, and logs to regularly clear out



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CLOSING THOUGHTS

- 1 Ask how Smart Communications can help with your migration
- 2 Analysis and planning ahead save costs in the long run
- 3 Benefits of moving to SmartCOMM™ far outweigh the effort to get there
- 4 Q&A



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