

Moving SMAX to SaaS

An outline for a smooth transition

Guide

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Solution Guide

This document provides OpenText™ SMAX customers with an outline for planning and executing the migration of their SMAX solution—currently installed on premises or in a public or private cloud—to OpenText™ SaaS.

Executive Summary

A growing number of organizations across the world are moving their ITSM solutions to the software-as-a-service (SaaS) consumption model. They're driven by the operational and financial benefits gained by:

- Delegating the hosting, operation, and optimization of the solution to a third party.
- Enabling staff to refocus their efforts on generating business value.

Companies using OpenText SMAX are no different. SMAX is a modern cloud-native software solution. Natively developed as microservices, it is delivered in containers and operates on a state-of-the-art Kubernetes engine. Consequently, the same SMAX software you use is also used for OpenText SMAX on SaaS—making the move to SaaS a relatively simple technical operation. However, because of the environmental changes attached to such a migration and the imperatives of a mission-critical system, the move should be handled as a formal project.

If you're a SMAX customer expanding into enterprise service management, this document will provide an outline for planning and executing the migration of your SMAX solution—currently installed on premises or in a public or private cloud—to OpenText SaaS.

Three Phases of Migration

Most SaaS migration projects have three phases:

1. Assessment phase
2. Migration phase
3. Consolidation phase

The combined timeframe for these three phases is generally three weeks. Sometimes, however, operational production constraints may extend the Migration Phase and therefore the total project duration. The timeline is controlled by overarching project management and governance requirements.

Phase 1: Assessment [Typical Duration—1 Week]

The goal of Phase 1 is to assess the size and complexity of the SMAX solution as well as the operational production constraints for the blackout window. These two factors will determine the effort required and the project duration.

The migration of a mission-critical solution, such as an enterprise service management application, should be handled as a formal project—even when the software is container-based and the same in both environments—to effectively address any necessary environmental changes.

Phase 1 activities:

- Complete an OpenText assessment questionnaire aimed at identifying environmental elements such as:
 - The need for any SMAX version upgrades.
 - The authentication mechanisms (SSO, SAML, LDAP, etc.) currently in use.
 - What the current system/tenant footprint is and whether it can be reduced by deleting old content.
 - Whether any short URLs are in place.
 - How many external integrations are in use and with which third-party systems.
- Identify agenda constraints and determine possible blackout windows for the actual move, typically accomplished over a weekend.

The outcome of the Assessment Phase is a tentative calendar of events and a detailed list of activities to be performed during the Migration Phase.

Determining the size, complexity, and appropriate execution for your migration effort depends on environmental factors and organizational constraints uncovered during the Assessment Phase of the project.

Phase 2: Migration [Typical Duration —1 Week to 1 Month]

The Migration Phase is split into two subphases—Dry Run and Go Live—designed to ensure the successful migration of SMAX as the backbone of IT processes. The typical duration for the two subphases depends on your organization’s ability to book the required blackout window, which is usually a few weekend hours.

1. DRY RUN

In the Dry Run phase, all the steps identified at the end of the Assessment Phase are tested. The results are checked for functional validity and used to accurately estimate the duration of the Go Live phase.

Dry Run activities:

- Package SMAX tenant data.
- (Optional, if version upgrade needed) Transfer packaged tenant data to SaaS staging infrastructure.
- (Optional, if version upgrade needed) Perform required version upgrades on the staging environment.
- (Optional, if version upgrade needed) Export packaged data from staging environment into the Dry Run SaaS tenant.
- (Optional) Configure the tenant custom domain (short URL) and tenant settings.
- Perform post-import tasks (DB tuning, reindex).
- Reconfigure integrations against the SMAX SaaS tenant.
- Perform any post-move configuration changes (URLs, custom actions, etc.).
- (Optional) Configure SAML setup and test.

Once the steps above are completed, the system is inspected to validate data integrity and perform a User Acceptance Test.

At the end of the Dry Run, the project team has a clear set of migration steps and a solid estimate of the combined timeline. With that information, you can define with greater accuracy the necessary blackout window timeframe, build a definite Go Live schedule, and communicate the Go Live blackout window across the organization.

2. GO LIVE

In the Go Live phase, the production SMAX system is moved to the SaaS environment during the agreed upon blackout window. Note that the SMAX production tenant cannot be changed (no configuration change, no data import) between the Dry Run and the Go Live phases.

During the migration Dry Run, all identified process steps from the migration plan are tested and validated before the production SMAX environment is moved during the Go Live phase.

Go Live activities:

- Replay the steps identified and performed during the Dry Run, including all integrations.
- Perform the final User Acceptance Test.

At the end of the Go Live phase, the new SMAX system is up and running in the OpenText SaaS environment. From the point of view of the SMAX system user (service portal user or SMAX agent), the migration is complete.

Phase 3: Consolidation Phase [Typical Duration—1 Week]

The Consolidation Phase consists of completing post-migration steps.

Phase 3 activities:

- Remove access to the original SMAX production tenant in order to decommission it and reclaim related hardware and software.
- Create a new SMAX development tenant as a clone of the new production tenant so that new development/configuration can be done.
- Monitor the tenant load and potentially tune the internal SaaS resources for optimal performance. This step is handled by the Micro Focus SaaS Operations team.

At the end of Phase 3, the migration project is considered complete and successful.

A successful migration concludes with the decommissioning of the original tenant, the creation of a clone to aid in further development, and performance tuning of the new production environment.

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Conclusion

Moving to SaaS presents obvious benefits that include removing the need to manage hardware and software underpinning a SMAX solution. We hope this guide shows that making the move—whether from a customer or partner-managed environment—is a relatively straightforward operation that can typically be achieved in just a few weeks with little execution risk.

Contact your sales representative for more information.

Learn more at

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