

Upgrading to Ingeniux CMS 10.6

Everything you should know going
into your upgrade.

Presented by Ingeniux

INGENIUX

Here's what we'll cover today:

- ▶ Brief overview of the 10.6 release and notable features
- ▶ How to prepare internally
- ▶ Detailed overview of the 10.6 upgrade process
- ▶ Q&A



CMS 10.6

What you need to know about the latest release of Ingeniux CMS before going into your upgrade.

Overview

- ▶ Released Fall 2023
- ▶ Faster and Better Performance
- ▶ Security Enhancements
- ▶ Introduction of Generative AI
- ▶ User Interface Improvements
- ▶ New/Updated Features

Features of Note

New:

- ▶ AI Module
- ▶ Custom Macros
- ▶ OAuth Identities
- ▶ DITA Publishing Pipeline

Improved:

- ▶ In-Context Editing
- ▶ Page Builder
- ▶ InSite Search
- ▶ Taxonomy Management

Upgrade Considerations

You'll need to plan ahead if you want these new or improved features:

- ▶ In-Context Editing
- ▶ InSite Search
- ▶ OAuth Identities
- ▶ DITA Publishing Pipeline

In-Context Editing (ICE)

Here's what you should know:

- ▶ Base functionality remains the same. Upgrading will not degrade performance.
- ▶ New features need implementation to work:
 - ▶ Empty component fields
 - ▶ List fields with supported sub-fields
 - ▶ Supported fields in embedded components

InSite Search

Here's what you should know:

- ▶ Administration of synonyms and keymatches added to CMS
- ▶ New administration of synonyms works immediately with ISS
- ▶ Implementation is required to take advantage of keymatches
- ▶ Existing implementations of either may need to be remapped
- ▶ Import of existing settings requires file access to CMS server

OAuth Identities

Here's what you should know:

- ▶ New authentication method for external CMS connections
- ▶ Required for all Ingeniux CMS 10.6 Automated Tasks
- ▶ Other implementations, such as REST API, can be updated but not required

DITA Publishing Pipeline

Here's what you should know:

- ▶ Optional new functionality to support DITA publishing
- ▶ Implementation and server updates required to use
- ▶ Administration determines who has access to feature

How to Prepare

- ▶ Learn about new and updated features on the Support Portal (more on next slide)
- ▶ Read product documentation
- ▶ Meet internally to define feature and functionality requirements for your upgrade
- ▶ Meet with your Account Manager to solidify your plan and kick off the upgrade process

Knowledge Resources

Documentation

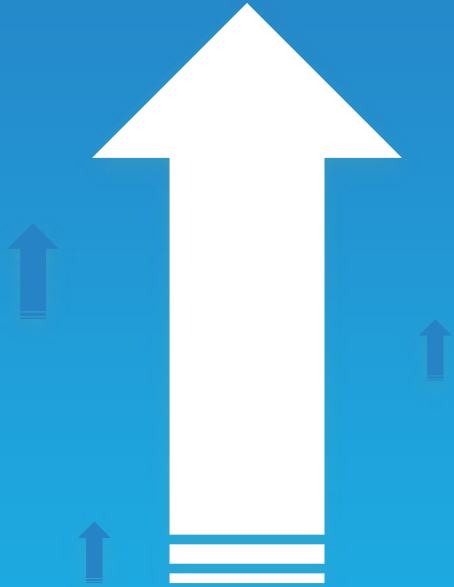
- ▶ CMS 10.6 Release Notes: <https://support.ingeniux.com/knowledge-base/documentation/cms-106-release-notes>
- ▶ CMS 10.6 Documentation: <https://support.ingeniux.com/knowledge-base/documentation/cms-10>

Tutorials

- ▶ 2023 Fall Release Feature Highlights Series: <https://support.ingeniux.com/knowledge-base/tutorials/fall-2023-software-release-highlights>

Articles

- ▶ 10.6 AI Module: <https://support.ingeniux.com/knowledge-base/articles/looking-back-at-2023-software-release-highlights-ai-module>
- ▶ 10.6 InSite Search: <https://support.ingeniux.com/knowledge-base/articles/looking-back-at-2023-software-release-highlights-insite-search>
- ▶ 10.6 Taxonomy Management: <https://support.ingeniux.com/knowledge-base/articles/looking-back-at-2023-software-release-highlights-taxonomy-management>
- ▶ 10.6 OAuth Identities: <https://support.ingeniux.com/knowledge-base/articles/looking-back-at-2023-software-release-highlights-oauth-identities>
- ▶ 10.6 Custom Macros: <https://support.ingeniux.com/knowledge-base/articles/looking-back-at-2023-software-release-highlights-custom-macros>
- ▶ 10.6 Page Builder: <https://support.ingeniux.com/knowledge-base/articles/looking-back-at-2023-software-release-highlights-page-builder-updates>
- ▶ 10.6 In-Context Editing: <https://support.ingeniux.com/knowledge-base/articles/looking-back-at-2023-software-release-highlights-in-context-editing-updates>



Upgrade Process

A detailed step-by-step overview of the Ingeniux CMS 10.6 upgrade process.

Some factors to keep in mind...

Everyone's upgrade is unique. Depending on the following factors, yours may look a little different than the one we're going to present here.

- ▶ **Hosted** vs. On-Premise
- ▶ **Ingeniux Development Services** vs. In-House Development

1

Preparation

Define your requirements; make a plan.

During this phase...

- ▶ Educate yourself and your team.
- ▶ Meet internally to strategize.
- ▶ Meet with your Account Manager:
 - ▶ Identify feature requirements/interests
 - ▶ Discuss unique implementation requirements/factors
 - ▶ Solidify your upgrade plan
- ▶ Request to upgrade:
 - ▶ Tell your Account Manager you're ready to upgrade
 - ▶ Submit a support ticket on the Support Portal

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UAT Queue

Begin your upgrade journey...

During this phase...

- ▶ Enter the UAT Queue – essentially a waiting room of customers who would like to upgrade.
- ▶ Enter the Feature Audit phase if you:
 - ▶ Require certain features (see list from earlier in presentation)
 - ▶ Indicate you are interested in certain features and want a view into scope of work to implement
- ▶ If you have opted out of these features (or want to circle back later) you'll be marked “UAT Ready” and will await the assignment of a Support Engineer.

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Feature Audit

Your pathway to the features you need.

During this phase...

- ▶ Ingeniux Development Services audits your site for the features you've requested.
- ▶ Ingeniux provides scope of work and price estimate.
- ▶ Account Management will then meet with you to:
 - ▶ Present scope of work and cost estimate
 - ▶ Refine and finalize scope of work based on your requirements
 - ▶ Define billing model
 - ▶ Finalize paperwork
 - ▶ Hand-off for feature implementation
- ▶ If you decide to skip feature implementation (perhaps you want to circle back later) you'll return to the UAT Queue under "UAT Ready" status.

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Feature Development

Implementation and validation.

During this phase...

- ▶ Ingeniux Development Services:
 - ▶ Implementation to support new features according to final scope of work
 - ▶ Quality assurance testing and validation
 - ▶ Hand-off for UAT
- ▶ Return to the UAT Queue under “UAT Ready” status.
- ▶ Await assignment of Support Engineer.
- ▶ The implementation updates will be incorporated into the UAT Environment.

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UAT Hand-Off

Transition into user acceptance testing.

During this phase...

- ▶ Customers in the UAT Queue marked “UAT Ready” will await the availability of a Support Engineer.
- ▶ When an engineer is assigned, Ingeniux will notify you.
- ▶ UAT Hand-Off Meeting:
 - ▶ Transfer of knowledge and materials to Ingeniux Support
 - ▶ Review upgrade plan and unique requirements
 - ▶ Account for any implementation updates that occurred during the Feature Development phase
 - ▶ Officially start the Active UAT phase

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Active UAT

Test your site in CMS Version 10.6.

During this phase...

- ▶ Test your site in a Support-provisioned UAT environment.
- ▶ Work with your assigned Support Engineer to troubleshoot and address any issues or concerns.
- ▶ Carefully read documentation around relevant new features and thoroughly test them in the new environment.

Use our handy feature guide when testing new features – we'll provide it along with the recording of this webinar!



GO LIVE!

It's time to show your upgraded site to the world...

To summarize...

1 Plan, Prepare, and Request to Upgrade

1

3 Feature Development

3

5 Active UAT

5

2 Feature Audit

2

4 UAT Handoff

4

6 Final Approval & Go Live

6



Q&A

Ask the Experts:

Ingeniux Training

Ingeniux Support

Ingeniux Development Services

Thank you!

Learn more:

support.ingeniux.com

Get in touch:

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