Upgrade Guide

Transitioning to the New IT Visibility with Technology Intelligence Platform

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Contents

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Upgrade Guide: Transitioning to the New IT Visibility with Technology Intelligence Platform

Welcome to the next generation of IT Visibility, now leveraging the Technology Intelligence (TI) Platform! This guide is designed to help you seamlessly transition from the existing IT Visibility product to the new, enhanced version. Our goal is to ensure that you maximize the value of this upgrade with minimal disruption to your ongoing operations.

Upgrading to the New IT Visibility

IT Visibility with the new Technology Intelligence Platform delivers significant advantages:

- **Single Source of Truth:** Provides a consistent, unified view of your entire IT estate through a single, normalized data model.
- **Comprehensive Data Access:** Achieve unrestricted access to your data with an extensible unified object model that provides a common ontology for describing your entire IT landscape. Utilize a flexible and extensible search/query filter API, based on GraphQL; to efficiently retrieve the data you need to solve critical business problems.
- **Advanced Analytics and Insights:** Offers deep visibility with Microsoft Power BI™ for custom reporting and data visualization.
- **Scalable and Extensible Platform:** Features out-of-the-box capabilities that are flexible and extensible for future growth.

Upgrade Process Overview

The upgrade will be managed in several phases:

1. **Pre-Upgrade Preparation**
2. **Go-Live**
3. **Quality Assurance**
4. **Platform Configuration and Customization**
5. **User Acceptance Testing (UAT) and Training**
6. **Post-Upgrade Monitoring**

Each phase includes detailed steps to help guide you through the process.

Step 1: Pre-Upgrade Preparation

1.1. Upgrade pre-requisites:

- **IT Visibility Backend Upgrade:** If you have not applied the IT Visibility Backend Upgrade which was released in Q4 2023, the Technology Intelligence Platform upgrade will result in breaking changes to API responses and data downloads. If the update is not already completed, it will be executed at the time of upgrade to IT Visibility with Technology Intelligence Platform. For more information see here.
- **ServiceNow Integration:** Flexera has two different ServiceNow integrations certified and available for download from the ServiceNow store. The "Flexera Integration" app supports Flexera's on-premises Data Platform and FNMS offerings and the "Flexera One" app supports IT Visibility powered by Technology Intelligence.
    - If the chosen ServiceNow integration is based on ITAM data, that is, the Flexera ServiceNow Business Adapter, no changes are needed.
    - If, on the other hand, leveraging data coming from IT Visibility with Technology Intelligence Platform is required, Flexera One Integration Application for ServiceNow v1.3 or above is required.

1.2. Review the Upgrade Plan

- Work with your Flexera account representative to understand the detailed upgrade plan, including timelines, responsibilities, and key milestones.

1.3. Conduct Stakeholder Alignment

- Identify and involve your key stakeholders, IT administrators, and end users. Establish communication channels to keep all parties informed throughout the upgrade process.

1.4. Assess Current IT Visibility Environment

- Perform a comprehensive audit of your existing IT Visibility environment:
    - **Data Inventory:** Identify all data sets currently in use, including hardware and software inventories, contextual data (formerly called Data Mashups).
    - **Reporting inventory:** Review all custom reports and dashboards and identify all that are required, and not required.
    - **Integration Points:** List all integrations with other systems (e.g., ITAM, SAM, CMDBs) to plan for updating these connections if you are using the vulnerability data set.

Step 2: Go-Live

2.1. Go-Live (taken care of by Flexera)

- The upgrade will be implemented by Flexera on the agreed go-live date.
    - **Minimize Disruption:** IT Visibility with Technology Intelligence Platform will be available alongside the existing IT Visibility for six weeks to enable a smooth transition.

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- o **Support Availability:** A dedicated team of Flexera SMEs is available during the go-live period to address any unexpected issues. They can be contacted at Support@Flexera.com

Step 3: Quality Assurance

3.1. Data Validation

- Perform a thorough data validation process:
    - o **Check Data Completeness:** Verify that all required data has been successfully migrated.
    - o **Data Integrity:** Ensure data accuracy, consistency, and completeness.
    - o **Resolve Issues:** Identify and resolve any discrepancies or missing data.

    Note: Some data discrepancies are expected. Results from the Technology Intelligence Platform are more up to date than from IT Visibility previously.

Step 4: Platform Configuration and Customization

4.1. Configure Core Platform Features

- Set up key functionalities within the new IT Visibility environment:
    - o **Dashboards and Reporting:** If you require custom views, recreate or enhance custom dashboards and reports using the new Power BI integration.
    - o **Business context:** If required, upload contextual data via Contextual Datastore API.

4.2. Integrate with Existing Systems

Note: All integrations will continue working, except where Vulnerability datasets are in use.
- Where Vulnerability datasets are in use, reconfigure integrations to work with the new Technology Intelligence Platform:
    - o **Update Connectors:** Adjust API connectors and data pipelines to point to the new IT Visibility Vulnerability datasets.
    - o **Validation of Integrations:** Test and validate each integration to ensure data flow continuity.

4.3. Enable Extensible Capabilities

- Activate new capabilities provided by the Technology Intelligence Platform:
    - o **Data Analytics:** Utilize the embedded Microsoft Power BI™ for advanced data visualization and insights.
    - o **Custom Extensions:** Implement additional capabilities or integrations based on your organization's unique requirements.

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4.4. Validate Configuration Settings

- Conduct a detailed review of all settings to ensure the new IT Visibility environment aligns with your organization's needs:
    - **Confirm Platform Behavior:** Validate that Technology Intelligence Platform behavior matches expected outcomes.
    - **User access:** Confirm users have been enabled with the required roles to access new capability.

Step 5: User Testing and Training

5.1. Develop Testing Plan

- Design a comprehensive plan to test all aspects of the new IT Visibility environment:
    - **Test Scenarios:** Develop scenarios that cover all use cases, including data retrieval, reporting, user permissions, and integrations.
    - **Define Success Criteria:** Establish success criteria for each test case.

5.2. Conduct User Testing

- Engage a diverse group of end users to perform testing:
    - **Execution:** Run test cases and document any issues or gaps.
    - **Feedback Collection:** Gather feedback from users regarding the new platform's usability, performance, and functionality.

    Note: Flexera recommends performing testing in a production environment. There is no risk to production systems or processes as capability is net new.

5.3. Address Findings

- Review and resolve any issues identified during testing to ensure a smooth go-live experience:
    - **Prioritize Issues:** Address critical issues that could impact business operations.
    - **Validate Fixes:** Re-test resolved issues to ensure they meet the expected criteria.

5.4. Deliver Training Sessions

- Conduct training sessions to familiarize users with the new IT Visibility environment. Flexera teams can help to provide live training sessions or recorded sessions.
    - **On-Demand Resources:** Provide access to Flexera training videos, user manuals, and quick reference guides.

Step 6: Post Migration Monitoring

6.1. Post-Migration Support and Optimization

- Leverage Flexera's post-migration support to address any ongoing issues and optimize platform use:

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- o **Regular Check-Ins:** Schedule regular check-ins with Flexera representatives to review progress and optimize usage.
- o **Continuous Improvement:** Collect feedback and identify areas for further enhancement.

6.2. Feedback and Continuous Improvement

- Solicit feedback from users and stakeholders to identify improvement opportunities:
  - o **User Surveys:** Please participate in Flexera surveys to gather insights on user satisfaction and areas for improvement.
  - o **Iterative Improvements:** Work with Flexera to implement any necessary changes and optimizations.

Additional Resources

- **Flexera Customer Support:** Contact your Flexera account representative for personalized support throughout the upgrade process or email us at support@flexera.com.
- **User Training Materials:** Access webinars, guides, and video tutorials to help your team maximize the benefits of the new IT Visibility with Technology Intelligence Platform.
- **Knowledge Base and Community:** Visit Flexera's community website for additional resources, FAQs, and peer support.

By following this comprehensive guide, your organization will successfully upgrade to the new IT Visibility with Technology Intelligence Platform, unlocking enhanced capabilities, deeper insights, and greater value from your IT data.

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About Flexera

Flexera helps organizations understand and maximize the value of their technology, saving billions of dollars in wasted spend. Powered by the Flexera Technology Intelligence Platform, our award-winning hybrid IT asset management and FinOps solutions provide comprehensive visibility and actionable insights on an organization's entire IT ecosystem. This intelligence enables IT, finance, procurement and cloud teams to address skyrocketing costs, optimize spend, mitigate risk, and identifies opportunities to create positive business outcomes.

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