



METASTORM BPM END OF LIFE

A Modus21 White Paper

Abstract

A synopsis of the options available to organizations that currently have Metastorm e-Work, Metastorm BPM, or OpenText MBPM installed within their IT infrastructures.

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Modus21 is a business-technology consulting firm with 10+ years of Business Process Management (BPM) implementation and integration experience. We remain unbiased and software agnostic. We do not sell or resell software, rather we leverage our expertise to help organizations improve their business performance through the implementation of process and technology.

Introduction

Metastorm entered the business software industry in 1996. Its premier product offering was a business process management (BPM) product originally called e-Work, later renamed Metastorm BPM, and now referred to as MBPM. The platform evolved through numerous evolutions including both technology acquisitions as well as upgrades. Ultimately, Metastorm was acquired by OpenText in 2011 as a way for the latter to firmly establish a credible offering within the business process management software sector. OpenText followed the Metastorm acquisition with the purchase of another BPM vendor, Cordys, in 2013. Since that time, OpenText has been shifting its BPM solution offering away from the MBPM software toward Cordys, which has been rebranded OpenText Process Suite.

While OpenText has not firmly established an ultimate support horizon for the MBPM software solution, it has repeatedly stated that the future of BPM at OpenText is Process Suite. OpenText has also indicated that it will continue to support the latest version of MBPM for several years, but that ultimately a migration to Process Suite will be necessary for clients who want to maintain vendor support. Unfortunately, there is no automated migration path from a Metastorm solution to Process Suite. Thus, organizations currently running Metastorm e-Work, Metastorm BPM, or OpenText MBPM have a definitive and substantial End of Life (EoL) issue to resolve.

This white paper presents the upgrade and migration options available to organizations running a legacy version of Metastorm business process management software.

Why is this Happening?

Every organization has faced it one time or another in the past 20 years - software assets are declared obsolete and become unsupported. It is a common issue faced by contemporary digital businesses and one that requires technology refresh cycles to be regularly considered. This, in turn, causes the need to plan and implement a migration to another version of the same product or transition to another platform that is supported.

At the end of the first quarter 2015, OpenText updated the support dates associated with Metastorm BPM (see *Table 1*) and signaled the desire to move existing MBPM V7.6.4 and earlier customers to MBPM V9.x or the Cordys platform which has been rebranded as the OpenText Process Suite.

The following is an excerpt from Brian Wick, Senior Director of Product Marketing at OpenText in response to Jerome Pearce's LinkedIn® BPM Gurus group discussion regarding the end of support for Metastorm BPM. *"For MBPM V7.6.4, the latest version of the MBPM V7.x code base, we have published that we will provide "Continued Support" for this platform until 1/31/2018, and "Sustaining Support" beyond that date. This should give our customers running MBPM V7 plenty of extra time to complete migrations to MBPM V9.x or consider the opportunity to move to OpenText Process Suite if that is appropriate for them..."* **Source: Migrating from Metastorm BPM to Another Platform; LinkedIn March 2015**

Product Name	Version	Release Date	Sustaining Maintenance
MBPM	9.4	Dec-14	Dec-19
MBPM	9.3.2	Jun-14	Jun-19
MBPM	9.3.1	Jan-14	Jan-17
MBPM	9.3	Jun-13	Jun-16
MBPM	9.2	Jul-12	Jul-16
MBPM	9.1	Jun-11	Jun-15
MBPM	9	Dec-09	Dec-13
MBPM	7.6.4	May-08	Jan-18
MBPM	7.6	May-08	May-16
MBPM	7.5	Apr-07	Apr-11
MBPM	7	Jul-06	Jul-10
MBPM	6.6.4	Apr-06	Apr-09
MBPM	6.6.3	Dec-05	Apr-08
MBPM	6.6.2	Aug-05	Apr-08
MBPM	6.6 (6.6.1)	Apr-05	Apr-08
MBPM	6.5	Aug-04	Aug-07
MBPM	6.2	Mar-04	Mar-07
MBPM	6.1.2	Dec-03	Dec-06
MBPM	6.1	Nov-03	Nov-06
MBPM	6.0.1	Oct-03	Oct-06
MBPM	6	Aug-03	Aug-06
MBPM	5.4	Apr-03	Apr-06
MBPM	5.3.2	Nov-02	Nov-05
MBPM	5.3.1	Jul-02	Jul-05
MBPM	5.3	Apr-02	Apr-05
MBPM	5.2	Nov-01	Nov-04
MBPM	5.1.1	Aug-01	Aug-04
MBPM	5.1	Apr-01	Apr-04
MBPM	5	Jan-01	Jan-04
MBPM	4.1	Nov-99	Nov-02
MBPM	4	Sep-98	Sep-01

Table 1: OpenText BPM Support Dates as of Q1, 2015
Source: OpenText Knowledge Center, Support Lifecycle

The End of Life (EoL) issue represents a business decision not unique to Metastorm. This situation is ubiquitous to all software and one which technology decision makers must deal with due to the natural lifecycle of commercial software and the evolution of technology. To that end, it is critical that technology decision makers recognize business process management software (BPMS) as a platform upon which business applications are built and deployed. The real value to the organization is the business application, not the BPMS itself. Hence, both the business application and the BPMS product must be separately reevaluated on a periodic basis to determine appropriate fit within an organization. It is often the case that platform products like BPMS should be updated or cycled out of an organization's technology stack while the business applications deployed within the BPMS must be maintained and migrated to other solutions.

Software EoL situations also represent significant organizational risks that should not be discounted. The most obvious risk is related to software and systems security. However, organizations must also consider access to knowledgeable resources, long-term viability of integrations, and compliance requirements.

What are my Options?

Run an unsupported Metastorm System

Organizations should remember that the licenses they purchased are perpetual and applicable to any version of Metastorm which was available as of the last payment of annual maintenance. This means that organizations can run any version of Metastorm or OpenText MBPM for as long as they want regardless of whether OpenText continues to provide support. Additionally, it means that they have the right to download a newer version of the software, even if that version is not supported by OpenText. Thus, they can continue to run a stable Metastorm application in perpetuity and without restriction if it was purchased with a standard licensing agreement. Of course, each organization should verify their situation by reviewing their specific licensing agreement. Additionally, IT decision makers must be aware that continuing to run unsupported software systems does come with legitimate risks and may be contrary to organizational policies. Some of these risks were identified above.

Upgrade to an OpenText Supported Version

The standard solution to the EoL issue is to upgrade to a version supported by the vendor. This is generally the lowest cost and lowest risk option. However, the Metastorm EoL issue is complicated by three distinct facts. First, the migration from v7.x to v9.x is not seamless. Second, OpenText's long term plan is to migrate all legacy Metastorm and MBPM customers to OpenText Process Suite. Third, the migration from MBPM v9.x to OpenText Process Suite is a complete technology shift with no automated migration tools. In other words, at present it is a manual re-design, development, and deployment in a Java based environment.

As illustrated in Table 1, the two supported versions which are logical candidates for consideration are Metastorm BPM v7.6.4 or OpenText MBPM v9.4. These options provide vendor support until January, 2018 and December, 2019 respectively. As of mid-year 2015, these options provide organizations between 2.5 and 4.5 years of vendor support. While these options do provide a legitimate reprieve from any immediate concerns regarding the Metastorm support horizon, it must be understood that this simply pushes the immediacy of these issues to a later date. Organizations should consider this a short-term strategy that provides enough time to appropriately plan, consider, and execute a longer-term strategy.

Migrate to Alternate BPMS

An EoL scenario is often the impetus for evaluating alternative software options. Organizations currently running Metastorm software should use this opportunity to determine if the OpenText Process Suite solution is a good fit for their enterprise. If OpenText Process Suite is a good technology fit, then those organizations will need to consider the long-term migration path from Metastorm to that platform. However, it is entirely possible that OpenText Process Suite is not a

viable long-term option, for example due to the shift from .NET to Java. If this is the case, organizations should perform an analysis of alternatives to identify a viable alternate process execution platform, be it a BPMS, Adaptive Case Management (ACM) tool, purpose built point solution, or Enterprise Resource Planning (ERP) package. Regardless of the decision path followed, organizational decision makers must remember that the value resides within the executable business process application, not within the server platform that supports the application. As such, any number of software solutions will likely be able to provide similar functional capabilities.

Migrate Capability to Other Systems

The final option which should be considered is the migration of the business process application to an alternate technology solution already deployed within the enterprise. In truth, this is often considered in tandem with the above option to move to a different BPMS solution. However, it is worth recognizing that many organizations have continued to expand their technology options since initially deploying Metastorm applications. As such, it is entirely possible that an organization may have the ability to redevelop and deploy their Metastorm applications with other tools they already own such as an ERP product, Enterprise Content Management (ECM) product, or Master Data Management (MDM) product.

Available Migration Paths

Like any journey, the path to take is dictated by both the starting point and the destination. Before considering viable migration paths, it is important for organizations to understand the version of Metastorm BPM they are currently running. This will have significant impact on the time, cost and effort required to migrate to a supported version or alternate platform. Below is an overview of the available options based on each current Metastorm BPM version starting point.

Running Metastorm version 9.x:

Option 1: Keep using Metastorm version 9.x

For the time being, organizations running the latest version (v9.4) of the software are shielded from making major changes. As OpenText has indicated, version 9.4 systems will remain supported through 2020 and perhaps 2025 with patches and updates. This provides plenty of runway to remain ahead of future end of life issues and plan accordingly. They may still want to consider how MBPM fits into an overall IT portfolio management strategy. Organizations running either v9 or v9.1 will likely need to upgrade to v9.4. Likewise, those currently running v9.2 or v9.3, will need to start planning their upgrade to v9.4 in the near future to ensure continuous support.

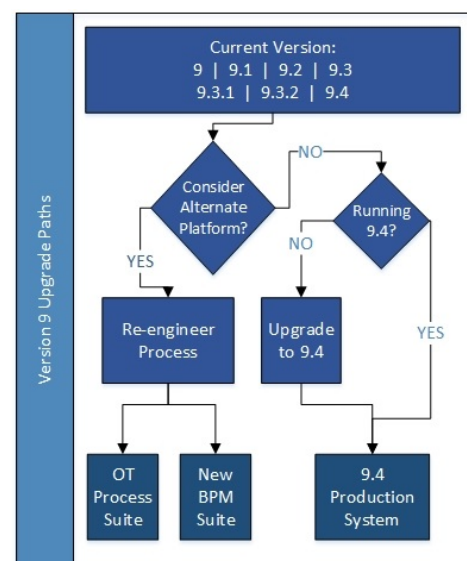


Figure 1: Version 9.x decision tree

Running Metastorm version 7.x:

Following is a list of the options available to 7.x users. Most readers will be in this category, running the latest 7.6.4 version and faced with the question of what to do to maintain critical business processes given the support sunset date of January, 2018. The good news is that there is still sufficient time for these organizations to decide which option is best suited to their needs and goals. The bad news is that upgrade and/or migration projects often take longer than most people think necessary and that planning should likely start in early 2016.

Option 1: Keep using Metastorm versions 7.x - Unsupported

While it is true that organizations can continue using their existing Metastorm system after vendor support ends, it is generally not recommended. For starters, the platform may become significantly more vulnerable to security risks, which means business critical functions could be in jeopardy. Also, as other software companies integrated with MBPM (i.e. accounting, ERP, document management, etc.) provide updates, outdated Metastorm versions may not be considered and existing integration code may cease to function properly. Additionally, because systems degradation is an ongoing process, the security and performance will only get worse over time. The decision to continue using an existing Metastorm 7.x system requires careful consideration of these and other risks as compared with the time and cost associated with the alternatives below.

Option 2: Upgrade to a supported version (9.4)

While at first glance this may seem to be the most cost effective and fastest solution, this too should be weighed against an organization's long term goals. The upgrade path from any version prior to v9 is not an easy path and presents its own unique challenges. With Metastorm BPM v9, Metastorm changed the underlying solution codebase to C#. While this change made C# available for use in Server-Side Scripts, it also deprecated the VBScript and JScript .NET languages used in previous versions as well as the proprietary language Metastorm created for its process scripts. This means that any code written using those languages must be converted to C# when upgrading to MBPM v9.

There are two paths that can be followed in upgrading prior versions to MBPM v9.4:

- The first path is to completely re-create all processes. This involves manually re-creating the existing v7.x processes within the v9.4 MBPM Designer. These re-created processes must be developed, tested, and validated in Metastorm version 9.4. While this seems to be drastic, this option allows for the implementation of best practice updates, system optimization (eliminate unused or outdated processes), and generally represents an opportunity to improve the current processes while leveraging newer features of the v9 MBPM platform.
- The second path requires the use of a migration tool (provided by OpenText) to migrate the processes and all of their associated components to the C#.NET language used by MBPM v9. While this may appear less complex than a total recreation, the process still requires development efforts post migration as well as additional effort for the implementation of any best practice or functionality improvements that could be recognized by performing a manual re-creation of the system. Once the processes are functional, testing and validation can begin.

While either of these paths will lead to a supported version of OpenText MBPM that will be supported for several years to come, consideration should be given to weighing the cost to upgrade against the cost of migration to an alternate solution.

Option 3: Switch to OpenText Process Suite

The third option organizations running v7.x have available is to move to the OpenText Process Suite. Because there are currently no migration tools available, all of the processes and their associated components will have to be manually reconstructed in the Process Suite product. Organizations whose strategy includes Cloud-based infrastructure (single or multi-tenant) may want to consider Process Suite as part of their technology upgrade strategy. If these are not strategic goals or the existing Metastorm system is not a candidate for this type of deployment architecture, then the organization may want to consider another option.

Option 4: Switch to a new systems vendor

Switching BPM vendors may seem like a daunting task. However, this may be the simplest and most cost effective option for organizations looking to take advantage of new technology features and integration capabilities that have become available since their current system was installed. It never hurts to look at what alternatives are available and how they may improve current organizational performance. Many organizations in this position will consider hiring a partner like Modus21, who will work with them to identify their organization's long term technology needs and perform an analysis of alternatives to help select and implement a new system that will best support the organization's goals and mission.

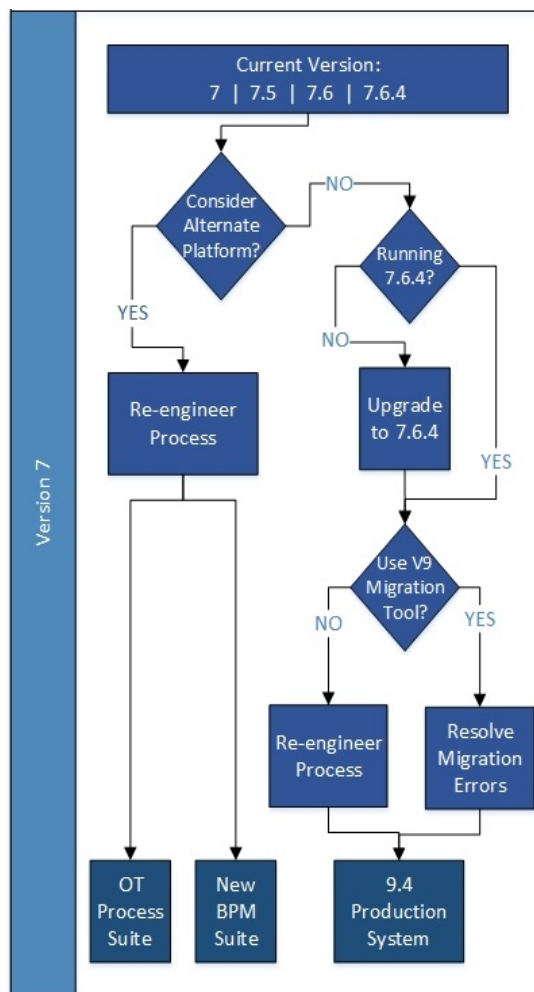


Figure 2: Version 7.x decision tree

Running Metastorm version 6.x, 5.x, 4.x:

Very few organizations are still running any version of Metastorm e-Work prior to version 7. It is likely that any organization which is currently running a copy of version 4, 5, or 6 has been unsupported for several years. While the same four options exist for these users as for 7.x users, it is important to note that a significant number of upgrades will be required to bring these system up-to-date to the latest supported version of MBPM. The number of upgrades and how those updates are implemented will depend on the exact version the organization is running. Figure 3 provides a graphical view of the necessary upgrades. Given the extra steps and efforts required to update these systems to OpenText MBPM v9.4, organizations are encouraged to consider talking to an expert about how to best progress.

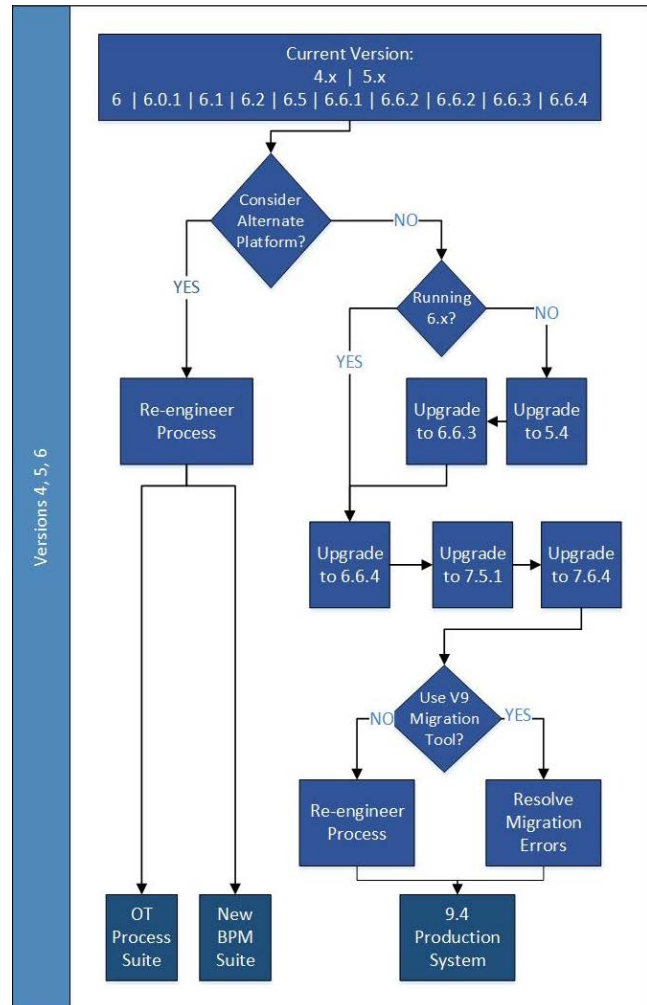


Figure 3: Metastorm version 4,5 & 6 Upgrade Path

Conclusion

OpenText is shifting its business process management solution offering away from the Metastorm BPM software to the OpenText Process Suite. While OpenText has indicated that it will continue to support the latest version of MBPM for several years, it has also stated that ultimately a migration to Process Suite will be necessary for clients who want to maintain vendor support. Thus, organizations currently running Metastorm e-Work, Metastorm BPM, or OpenText MBPM have a definitive and substantial End of Life (EoL) issue to resolve.

This white paper has presented the upgrade and migration options available to organizations running Metastorm's legacy business process management software. After reading this paper, IT leaders should have a better understating of the available options to weigh against their long term business application strategy. These options include maintaining their legacy Metastorm solution, upgrading to the OpenText Process Suite, or migrating to an alternative platform. Finally, technology decision makers should be aware that Modus21 can provide expert advice and help mitigate the risks associated with the Metastorm End of Life issue as well as help plan, consider, and execute a longer-term strategy.

If you would like to discuss these options with any of our experienced, unbiased, MBPM experts, please contact us at www.modus21.com.