

# EXPERT ADVANTAGE — PARTNER PRE- UPGRADE REVIEW



Welcome to the Expert Advantage Partner Upgrade Review Program. This program is designed to improve your customer’s upgrade experience and ensure a successful upgrade of their Broadcom Software product. Our experience has shown that customers receiving this level of care prior to their upgrade results in fewer production down and other issues during and after the upgrade, derive more value from their applications faster, and report a much higher customer satisfaction score.

Partners should use this form to capture the necessary information needed for Broadcom Software Support to prepare for a conversation regarding their customer’s goals, environment, and upgrade timing. The information must be attached to a Wolken support case created by the partner on behalf of the customer. It initiates the knowledge transfer via Run Books and KB Articles, a partner 1:1 call with Support, and creating a customer Hot Site.

## Getting Started — The Basics

All cases are opened through the Broadcom Software Support Portal or by calling GCA.

- 1 Open a support case with Broadcom Support using the Wolken system on behalf of the customer; attach this form within the case you create. Open your case here: [support.broadcom.com](https://support.broadcom.com)
- 2 Once the case is created, with this form attached, Support will review and schedule time with you to discuss the upgrade in detail, check for potential tips and traps, help prepare you for the upgrade event, and set up a Hot Site for the upgrade. If you do not currently have a written plan please review the KB Articles and Run Book links provided below in order to create the event plan prior to case creation.
- 3 Support will provide technical expertise to partners using normal support escalation processes during the upgrade event.

**On behalf of\***

[type the customer’s name]

**On behalf of\***

[type the customer’s site ID, if known]

**Description of the Upgrade Event\***

**Product Name\***

**Current Version\***

**Upgrade Version\***

**Describe the Current Environment\***

[size/scale, on-premise/cloud, impact, etc.]

\*Required

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**Describe the Customer Environment\***

[unique considerations, or customizations, of the site being supported]

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**Written Event Plan\***

[provide details on your timing, resources and desired outcomes]

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**Critical Outage Start Date\***

**Critical Outage Start Time\***

**Critical Outage End Date\***

**Critical Outage End Time\***

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**Additional Details about the Customer, Upgrade, support needs**

If applicable:  
**Service Provider Company Name**

If applicable:  
**Service Provider Contact Name**

If applicable:  
**Service Provider Contact Phone Number**

If applicable:  
**Service Provider Contact Email**

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\*Required

# Knowledge Book Articles for Upgrade Planning

Enterprise Software Products

Product Name	Link to Template/Runbook
Enterprise Software Generic Template	<a href="https://ca-broadcomcs.wolkenservicedesk.com/wolken/esd/knowledgebase_search?articleId=242823">https://ca-broadcomcs.wolkenservicedesk.com/wolken/esd/knowledgebase_search?articleId=242823</a>
AAI - Automic Automation Intelligence	<a href="https://knowledge.broadcom.com/external/article?articleId=222335">https://knowledge.broadcom.com/external/article?articleId=222335</a>
APM 2x.x/AXA/ASM	<a href="https://knowledge.broadcom.com/external/article?articleId=243005">https://knowledge.broadcom.com/external/article?articleId=243005</a>
APM 10.8	<a href="https://knowledge.broadcom.com/external/article?articleId=243098#/">https://knowledge.broadcom.com/external/article?articleId=243098#/</a>
Automic Application Manager	<a href="https://knowledge.broadcom.com/external/article?articleId=222411">https://knowledge.broadcom.com/external/article?articleId=222411</a>
Automic Dollar Universe	<a href="https://knowledge.broadcom.com/external/article/97703">https://knowledge.broadcom.com/external/article/97703</a>
Automic Workload Automation	<a href="https://knowledge.broadcom.com/external/article/222239">https://knowledge.broadcom.com/external/article/222239</a>
Autosys (Workload Automation AE)	<a href="https://knowledge.broadcom.com/external/article?articleId=240223">https://knowledge.broadcom.com/external/article?articleId=240223</a>
Clarity	<a href="https://knowledge.broadcom.com/external/article?articleId=220185">https://knowledge.broadcom.com/external/article?articleId=220185</a>
Client Automation	<a href="https://knowledge.broadcom.com/external/article?articleId=243095">https://knowledge.broadcom.com/external/article?articleId=243095</a>
Configuration Automation	<a href="https://knowledge.broadcom.com/external/article?articleId=243273">https://knowledge.broadcom.com/external/article?articleId=243273</a>
DX NetOps (Spectrum, PM, VNA, MM, NFA)	<a href="https://knowledge.broadcom.com/external/article?articleId=220382">https://knowledge.broadcom.com/external/article?articleId=220382</a>
DX NetOps - Pre-Upgrade Check List	<a href="https://knowledge.broadcom.com/external/article?articleId=242680">https://knowledge.broadcom.com/external/article?articleId=242680</a>
DX Operational Intelligence	<a href="https://knowledge.broadcom.com/external/article?articleId=243005">https://knowledge.broadcom.com/external/article?articleId=243005</a>
Release Automation (Nolio)	<a href="https://knowledge.broadcom.com/external/article?articleId=242793">https://knowledge.broadcom.com/external/article?articleId=242793</a>
Service Mgmt - IT Asset Manager (ITAM)	<a href="https://knowledge.broadcom.com/external/article?articleId=136872">https://knowledge.broadcom.com/external/article?articleId=136872</a>
Service Mgmt - Service Catalog	<a href="https://knowledge.broadcom.com/external/article?articleId=136872">https://knowledge.broadcom.com/external/article?articleId=136872</a>
Service Mgmt - Service Desk Manager (SDM)	<a href="https://knowledge.broadcom.com/external/article?articleId=136872">https://knowledge.broadcom.com/external/article?articleId=136872</a>
Software Change Manager - Harvest	<a href="https://knowledge.broadcom.com/external/article?articleId=242840">https://knowledge.broadcom.com/external/article?articleId=242840</a>
UIM	<a href="https://knowledge.broadcom.com/external/article/238961">https://knowledge.broadcom.com/external/article/238961</a>
VAIM/SysEdge	<a href="https://knowledge.broadcom.com/external/article?articleId=56397">https://knowledge.broadcom.com/external/article?articleId=56397</a>
Workload Automation DE	<a href="https://knowledge.broadcom.com/external/article?articleId=242798">https://knowledge.broadcom.com/external/article?articleId=242798</a>