

LIFERAY DXP: UPGRADE READINESS CHECKLIST



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Expertly Plan Your Liferay DXP Upgrade

Liferay's newest release, the **Liferay Digital Experience Platform (DXP)**, is designed to provide a comprehensive solution to help businesses create engaging experiences and bring together a single view of the customer from **all touchpoints**.

With new features that provide **experience management**, **single view of the customer**, **engagement data**, and support for **modern UI and app frameworks**, Liferay DXP enables sales, marketing, support and service teams to work together for the customer. To fully leverage the new features of Liferay DXP means upgrading your existing Liferay deployment.

Any upgrade project comes with **significant investment** of time and expense. And a major product upgrade like this can be disruptive to your organization. It takes **proper planning** to minimize the disruption and ensure a smooth transition.

Rivet Logic's team of **Liferay experts** has created a **Liferay DXP Upgrade Readiness Checklist** to help you get started on the right track in managing your upgrade!

WHAT'S NEW IN LIFERAY DXP?

- **Connected Digital Experiences** - Create websites, mobile sites and apps, landing pages, and more while maintaining consistency in branding and experience across all touchpoints.
- **Architecture for Digital Readiness** - Quickly deliver business-ready solutions with Liferay's flexible and modular architecture.
- **Campaign Management** - Set up and track highly targeted marketing campaigns, with personalized content based on audience segmentation.
- **Single View of the Customer** - A single comprehensive customer profile aggregated across all interactions provides access to key information.
- **Engagement Metrics** - Core engagement metrics to effectively analyze your marketing campaigns to help you make data-driven business decisions.

BUSINESS STRATEGY - UNDERSTANDING THE UPGRADE

Developing the right upgrade strategy means first understanding your business needs, followed by how technology can be used to achieve that next level of competitive advantage.

- ✓ **New Features** - Schedule a demo of Liferay DXP to gain a better understanding of the new features offered.
- ✓ **Do I Need to Upgrade?** Determine how your organization will benefit from the upgrade and if the upgrade is necessary for your business needs. Does the existing version effectively meet your needs? If your project doesn't need an immediate upgrade, it might make sense to wait until the next Service Pack release, after initial bug fixes have been resolved.
- ✓ **Migration** - Determine how much of your existing data and content need to be migrated and how much new content creation you're planning to do.
- ✓ **Timeline & Impact** - Evaluate how the upgrade will affect your organization, including the impact and timing of the upgrade, how long it will take, system down times, etc.
- ✓ **Cost** - Assess costs associated with performing the upgrade, including professional services, new hardware requirements, training, etc.
- ✓ **Maintenance** - Determine what process would be best for ongoing maintenance of the solution including all Business Continuity requirements. This is an opportunity to assess whether a cloud hosted solution makes most sense.

TECHNICAL CONSIDERATIONS

With an updated architecture, upgrading to Liferay DXP is different from previous upgrades, involving increased complexity.

- ✓ **Upgrade vs Re-Write** - Upgrading to Liferay DXP is much different than previous versions. Since Liferay DXP has an updated architecture using OSGi, service modules, plugins, portlet configurations and customizations will need to be revised and reorganized to fit into the DXP dev and deployment environments. This significantly increases upgrade complexity, and makes the DXP upgrade similar to a new implementation.
- ✓ **Upgrade or Wait for SPx** - As with all new major releases, there are bound to be bugs. While Liferay has released a DXP patch to resolve existing issues, keep in mind that patches also introduce updated modules with the updated bundle versions. Any patch installation will require a re-evaluation of implemented code to ensure referenced modules are still usable after the installation.
- ✓ **Compatibility** - Make sure your environment is up to date with the [Liferay DXP Compatibility Matrix](#).
- ✓ **Customization level** - Determine the level of code customization in your Liferay implementation, which will drive the level of effort required in customized code migration. Keep in mind that Liferay DXP's updated package structure means you need to fix class reference statements or actual API calls for them to compile properly.
- ✓ **Custom Plugins** - The code to custom plugins with Liferay API calls will also require updating to function properly. You'll also need to determine a migration strategy for your custom plugins. As a best practice, we recommend that you migrate existing custom plugins into plain Liferay plugins instead of diving directly into the OSGi module.
- ✓ **Integrations** - To provide a single view of the customer means bringing together customer data from disparate systems across the enterprise (website, mobile app, customer portal, CRM, etc.). Determine which systems need to be integrated with Liferay DXP and what's involved in each integration.
- ✓ **Liferay Connected Services (LCS)** - Liferay Connected Services is a new online platform that offers a set of tools and services that lets you manage and monitor your Liferay installations. LCS is compatible with Liferay Portal 6.2 and Liferay DXP. If you're upgrading from an older version of Liferay, additional configuration steps may be required.