Your Flexible Partner for Business Systems

Things to consider when planning an ERP Upgrade

ERP upgrades can range from a straight forward technical upgrade to a complete re-implementation. When discussing your upgrade, suppliers will require some information and thinking about the following questions in advance will better prepare you for those discussions;

- Are you looking at new functionality?
- Do you want to take advantage of changing things that are not working now?
- Are you looking to change fundamental areas such as the chart for accounts?
- Would you like to run review workshops to assess how you are currently using the system, as well as workshops on the new areas?
- What resource do you have internally for this upgrade and what are their Full Time Equivalents (Including Project Management and technical)?
- What are your expectations regarding timescales?
- What are your expectations on help with areas such as testing?
- What are your views on risk? Some customers just order the technical upgrade and then test themselves. If they get issues, they then place an order for consultancy. Others prefer to order days upfront or sign up to G7's Application Managed Service offering
- Are you aware of any bespoke areas that may affect the upgrade?
- What modules are you using as opposed to which modules did you purchase?
- What level of Project Management assistance do you require? On site or remote?
- Do you need any forms and reports re-designed? If so, do you have the necessary in-house skills?
- Do you want to take the opportunity to redefine the workflows within the system?
- Will your stakeholders request a 'dry run'? This is when the live upgrade is carried out a couple of weeks before go live as a trial run, to see how long the business will need to be down for to facilitate the upgrade

Approach to Upgrades

- Option 1 (experienced User) – Customer downloads the software and installs on a test server. The customer will then have a look and identify areas they require supplier assistance and discuss with them
- Option 2 (new or inexperienced user) - This type of upgrade should be considered as a project. Discussions with the supplier are important and a plan of resources put together

Drivers for Change

- Current version is out of Support
- Support for latest browsers (IE , Google Chrome etc.)
- Stay on the latest release, upgrading every 12 to 18 months as part of your operation schedule and planning
- Processes and procedures within your company have changed since the original implementation
- New staff have joined your company with new ideas on how the software should be used

Technical considerations

- Carry out a technical health check to assess if the hardware and infrastructure will support the latest version of the product
- Review the supplier contract and what is covered through the supplier maintenance when upgrading

Things to Note

The customer must capture and test;

- Reports and Outputs
- Interfaces
- Customisation
- Add-ins, 32 to 64 bit technology may require some technical input
- Ask the supplier about any functionality no longer available within the new version and plan for this

Contact us now to discuss how G7 can help you with your Unit4 Business World (Agresso) or Lawson upgrade.