By Mervin January

Editor’s Note: Upgrades—sooner or later, you’ll be faced with one. And, if you’re tasked with orchestrating the implementation yourself—well, it can be a bumpy ride, to say the least. Mervin January knows. He’s done several himself and feels your pain. And so, he shares his “tonic” for making upgrades less of a thorn in your side, and more, well, bearable. His ten steps to an easier upgrade come, of course, with some detailed documentation from one of his real-life experiences.

OK, so you want to upgrade your ERP. This can result in excitement over the possibilities that exist with new features and benefits, as well as cold sweats over the amount of work to come. Whether upgrading from AS/400-based World software, OneWorld Xe Applications, or a previous release of EnterpriseOne, the upgrade implementation process requires major planning. In my career, I’ve survived a few upgrades, which has left me with some key thoughts on how to make this process easier—if “easy” can ever be used to describe an implementation.

For this article, we will focus on upgrading from OneWorld Xe to EnterpriseOne 8.11 on an AS/400 platform. This is a complex upgrade that requires a change of hardware, software, and space considerations, as well as standard operating procedures—in other words, not easy. As with any upgrade, there is going to be an adjustment period and a learning curve. The trick is to accomplish this task with the least amount of impact on the current user community.

What to expect during the upgrade process:

Each new release contains a different set of variables to consider. In this case, EnterpriseOne 8.11 is totally Web-based, does not require Citrix server farms, and does not allow the co-existence of World software objects; it’s based on a state-of-the-art technology architecture that provides a Web-based user interface, eases the transition to a Service-Oriented Architecture (SOA), and enables standards-based cross application integration. While there are some “gotchas” to consider (particularly in the area of security if you choose to move away from Citrix), EnterpriseOne applications have been successful because they include SOA capabilities delivered through the use of middleware and internet-based technology. This can lead to a long standing solution that, over time, will continue to deliver value.

In my experience, no two upgrades are exactly alike; however, I have 10 general steps that have served me well in my upgrade history! My wish is that they will provide you with some tips and tricks to make your next E1 upgrade “easier.”

Steps to a successful upgrade:

There is no such thing as a “perfect” project plan. However, a detail-oriented plan will help you to navigate through the many potential pitfalls and challenges associated with the upgrade process.

Step 1: Start with a diagram of the current ERP System Architecture to illustrate initial reference points for the upgrade procedure. Both JD Edwards and PeopleSoft architecture manuals offer prime examples on how to design such a diagram.

Step 2: Next, you’ll want to complete a fully detailed project plan that involves:

• Preparatory steps
• System upgrade procedures
• Data conversion
• Customizations
• System integration
• Organizational change management
• New data objects
• Application development life cycle procedures
• Upgrade status reports of milestones
• User acceptance testing in accordance with Service Level Agreements (SLA)
• Rollback procedures for recovery (very important)

Figure 1 offers an example of such a project plan.

Be sure to document any changes to the current change management process. A process-oriented approach should yield both a new level of awareness about the upgraded system and the time required to process a system change.

Step 3: Now, let’s use a diagram for critical required tasks that have multiple dependencies within the current project plan (see Figure 2).
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