

Migration to eB2.1



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Many organizations using QAD are contemplating migration to eB2.1. In some cases, the migration is from version as early as Ver 7.4. Migration to eB2.1 is unique since this version presents considerable change in the architecture. If migration is from any version lower than eB, additional challenges in the form of customizations and remapping might be present. Before proceeding to analyze the migration path, it would be worthwhile to look at some of the unique features of eB2.1

DOMAIN

eB2.1 introduces infrastructure for Shared Services Domain module, allowing companies to centralize operations in fewer databases. Each domain can have a different base currency, chart of accounts, as well as completely different configurations for manufacturing, distribution, services and financials. Any number of domains can be set up in one physical database-each domain with its own base currency, chart of accounts, operating controls, document numbering and security

GL CONSOLIDATION

Consolidation is typically used when multiple entities must report financial statements in one currency or using a common chart of accounts. In the earlier version, producing consolidated financial reports required exporting transactions from one database and importing them into the consolidation database. The addition of the domain concept supports enhanced and streamlined GL consolidation among entities within a domain and between entities in different domains.

ENHANCED SECURITY AND AUDIT TRAILS

The enhanced security features in eB2.1 increases control over system access at several points, including log-in, domain change, the menu system, and such elements as sites and GL accounts. Enhancements include a much more robust set of tools for assigning and controlling user passwords, as well as tracking and monitoring user access. eB2.1 introduces separately installed Enhanced Controls module-that allows companies to track in detail changes made to enterprise-critical data, what changes were made, and when.

Migration Path

The decision to upgrade or not, like most decisions is unique to each organization's IT environment. Highlighted below are some of the generic factors that act as drivers and deterrents to the upgrade process:

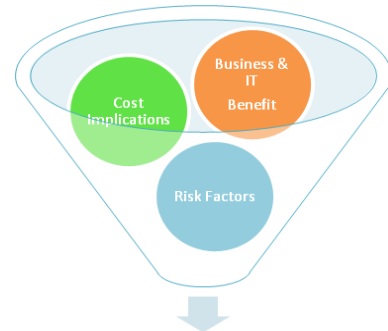
Drivers	Deterrents
1. Avoidance of compliance & technical risks	1. Upgrade Project costs
2. Change in business model / processes	2. Existing customizations & Business Cycles
3. Technology Upgrade	3. Release Maturity
4. Ongoing Support	4. Business continuity / Down time

The business case for migration to eB2.1 can be divided in three core / decision areas;

Business & IT Benefit, Cost implications and Risk factors.

An in-depth view of each area, with a perspective of the current environment, will help the business and IT management understand the value of the upgrade process.

Summarized below are the key factors (arranged in no specific order) to understand each of these decision areas. Our experience indicates that these factors weigh heavily in the overall success of the upgrade process.



Upgrade - Yes or No?

Application Impact: This risk factor highlights possible “collateral damage” to other applications in the ecosystem which are integrated with the application. A challenging aspect of most upgrade projects is to understand / estimate the impact on the other applications which are not scheduled for the upgrade. Special care needs to be taken here and a detailed due diligence, along with preparation of elaborate application maps, help mitigate the risks.



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Improvement of Information delivery: Often this is viewed only as a replication of existing systems. However, it can be viewed as an opportunity to deliver more value / power to the end user. Most upgrades to existing applications come bundled with, or are extensible to provide improved analytics and reporting tools. These offer significant benefits to end users in terms of access to relevant information more easily and with less IT support.

Impact on / by customizations: Perhaps the most significant variable in upgrade complexity is the extent to which the application has been customized to meet customer-specific business requirements. Customizations must be carefully reviewed and migrated, and in some cases, the coding must be redone in the new version. If extensive, customizations can be a significant barrier for upgrading to new software releases. Where migration is from a much earlier version, there could be opportunities to review and remove redundant customizations.

Change in Licensing mode & Architecture: Usually, there is no charge for the application software as long as the customer is subscribed to the vendor maintenance program, but certain releases require a change in the license model that can result in additional fees. Similarly certain upgrades mandate a change in the architecture of the application, requiring a change in the underlying hardware and software infrastructure, which also add to the overall cost.

Improved Configurability: The direction of newer versions of Enterprise applications is to provide the users with more flexibility through tools that allow for rapid configuration using objects, rather than custom coding. Although these capabilities are not fully available in current releases, they may be factored in as future capabilities.

Approach to Application Upgrades:

The customer's migration decision often follows one of the following three paths:

- Technical Migration
- Migration with Process re-mapping
- Re-Implementation

Technical Migration:

In this case, the option involves migrating to the stable, higher version without changing the mapping. This may have variety of flavors which could be with / without Progress upgrade, with / without infrastructure renewal. Typically, major effort involves in the conversion of the custom code, testing and cut over activities. The assumption here is that the existing processes, which are running on the older version is not going to change post migration.

Migration with process re-mapping

In this case the customer's current mapping may undergo change based on functionality offered in the new version and hence doing the migration on an "as is" basis may not yield greater value to them. There could be number of reasons for which customer may decide to re-map the processes; their rationale may be based on, a highly customized environment, new module available which can reduce customization, change in business practice, etc.

Re-Implementation

In this case the customer's current mapping would require significant change and hence it may require a fresh look at the entire set of current business processes and re-mapped to the current version of software. The reason for looking at re-implementation could be due to a highly customized environment, major business process change, company structure change, etc. This is a major decision and would entail the re-implementation of the application, scrapping the current mapping altogether. This is complicated and would require a major decision making process, before one can conclude to take on this path.

For the purpose of this document, focus would be on the steps required for technical migration. The high level steps and deliverables at each stage are stated below.

- Initial Site Assessment
- Project Charter & Kick-off
- Architecture Definition & Installation
- Custom Code review & Conversion
- Application Testing
- UAT & Training
- Production Cut Over
- Post Migration Support



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Brief details of each step are given below:

Steps	Description	Deliverables
Initial Site Assessment	<ul style="list-style-type: none"> Detailed study of existing IT environment Understanding of the business processes currently mapped Current health of application Business objectives / drivers for the migration Potential business process changes envisaged in near future Pros / Cons of possible migration options Impact on other application integration 	<ul style="list-style-type: none"> Migration Approach (As-is, Re-map, Re-implement) As-is Environment map Current process map Decide on the migration approach
Project Charter & Kick-off	<ul style="list-style-type: none"> Detailed Project charter with Cost estimates Detailed Project plan with potential go-live dates Customer Concurrence for charter / plan Engage resources (Customer / Partner) 	<ul style="list-style-type: none"> Project Charter Detailed Project Plan Project Approval Resource Allocation Project initiation
Architecture Definition & Installation	<ul style="list-style-type: none"> Define To-be Architecture map New Feature Training Procurement of hardware (if any) Procurement of software Change in Environment decisions Installation of all the hardware / software components in Dev / QA Environment Inventorize customizations 	<ul style="list-style-type: none"> To-be Architecture Ready Development environment Database Conversion (based on methodology decided) Custom code ready for conversion
Custom code Review / Conversion	<ul style="list-style-type: none"> Custom code review / conversion Unit Testing Minor Performance Tuning Re-writing of custom code (if source not available) Script Migration Documentation (incremental) 	<ul style="list-style-type: none"> Code converted into new version Ready for QA Deployment post testing Ready for Integrated Testing Documentation
Application Testing	<ul style="list-style-type: none"> Define Test Plans Functional / Integrated / Load Testing Script Testing Defect Fix and retest Get QA Environment ready for UAT 	<ul style="list-style-type: none"> Code Ready for UAT Database conversion in QA environment QA Environment Ready / Deployed Ready for User Testing / Training Phase
UAT & Training	<ul style="list-style-type: none"> User Acceptance Testing in QA Environment New Environment Training Detailed User Training Interface Testing completion User Documentation update 	<ul style="list-style-type: none"> Code Certified User Sign-off Training Completed User Documentation Update complete Decision on Cut over date / plans
Production Cut over	<ul style="list-style-type: none"> Production Environment Setup Configuration (Printers, Users, etc.) Script / Automated job setup Before / After Data validation plan / concurrence 	<ul style="list-style-type: none"> Production environment deployment Application ready along with custom code / integrations Database conversion in Production environment Data Validation and sign-off Security configuration New application operational
Post Migration Support	<ul style="list-style-type: none"> Defect Fix (if any) IT staff training / hand holding Final Project completion sign-off 	<ul style="list-style-type: none"> Stable Production environment Project Completion sign-off Handover environment to IT Re-align QA / Development environment Operational Manual updates Project Completion



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The Thirdware advantage

Thirdware has helped many of its customers on this migration journey. Our experienced team has completed many similar engagements, where we worked with the customer to address their migration challenges. The migrations have been varied. Some have been standard product migrations, while others included some amount of business process reengineering and finally, some required a complete reimplementation.

Our past experience allows us to be confident as well as qualified, to offer assistance as you embark on your migration journey.

Thirdware, with more than a decade of QAD experience, has helped companies, around the World; maximize value on their IT investments in QAD.

Thirdware represents,

An Experienced team of 200+ QAD Consultants
250+ Major QAD Engagements
1000+ person years of QAD Experience

Thirdware provides,

Adaptable Service and Delivery Models for Application Management
Large implementation, Migration and Consolidation Services
Extended Functionalities leveraging base QAD

We want to actively participate in your MFG/PRO Value Realization journey. Please do contact us at info@tspl.com for more information or visit our website at <http://www.tspl.com>



Thirdware QAD practice *Fast Facts*

- » An experienced team of 200+ QAD Consultants
- » 250+ QAD engagements
- » 1000+ person years of QAD experience

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