

Ross 6.3 SP5 Test Drive Upgrade Offer

**A Free Offer from
Managed IT Administration (MITA) Services of SWI**



SWI Ross ERP Upgrade Services A Managed IT Administration (MITA) Service from SWI

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Introduction

We know that doing version upgrades can be both a painful and expensive experience. Believe it or not upgrades don't have to be neither when performed leveraging technology and adding some innovation. Read on to understand how Software Works Inc, (SWI) as a Strategic CDC Services Partner deploys hosting services and collaborative technology with some marketing innovation to ease the upgrade pain and reduce the cost.

For those customers not on maintenance this offer is open to you as well, let us show you what the NEW ROSS ERP version can offer you. This isn't your old iRenaissance anymore. And for those who remember even further back, it's certainly not your old PROMIX anymore! Take a look (at no cost) at what you can NOW do with this new Ross ERP version. And remember given the Ross version support policy version 5.7 will soon fall from the list.

Test Drive Offer

An upgrade is a road trip; it can be a rough one or a smooth one. One that's well planned, ready for surprises, and one that's well driven can be smooth. An upgrade requires a diverse set of skills and those that have the smooth trip have been there many times before and know the way. They know the surprises that will occur and have the skills to navigate and reach the end because they're prepared.

Loaded with such a diverse set of skills and having traveled the trip many times before the folks at Software Works, Inc. (SWI) are ready to help you on your trip. To begin, SWI is offering customers the ability to make the trip much easier with a hosted 'Test Drive' offer through the Managed IT Administration (MITA) Services Group. These folks have offered (free of charge \$0.00) to convert your Ross ERP data to the latest version (and service pack) so you can 'Test Drive' the application (and SmartClient) with your own company's data with no additional hardware or setup required on your part. Simply transfer the database to our Ross ERP Datacenter (via FTP) and you'll soon get connected to 6.3 SP5 on our hosted environment. Check out the IAF SmartClient user training video and get started experiencing the NEW Ross ERP with the new features such as Manufacturing Costing and the new user interfaces such as SmartClient, and iBrowser.

With this test drive you can learn the new features, configure them to your liking, and find out if there's enough ROI to actually spend the money for the rest of the upgrade project. When/if you do get budget approval for an upgrade we'll analyze your customizations and uplift them in the new version using our 'Kinder Gentler Approach' making future upgrades smarter and easier.

If you need some support during your Test Drive we do offer at no cost the option of email support. Just stop driving and send us your email (it's not safe to drive and email at the same time).

On-Going Future Update (Service Pack) Support

And if you'd like you can leave your solution on our **hosted** (virtual) environment to test future service pack updates, hot-fixes, new programming changes, and even implement new modules! In addition with your environment hosted SWI can also introduce new functionality and technologies that you can add to your production environment such as Business Activity Monitoring, Advanced Sales Commission, and Business Performance Analytics.

Collaborative Approach – Experience Sharepoint technology!

Hopefully by now you've heard all about how Sharepoint Collaborative technology can improve your business in many different ways. Well our MITA Services Group is here to not just tell you but to SHOW you Sharepoint Collaboration!

As a company using any of our services be they implementations, support, customizations, upgrades, or taking advantage of our Test Drive offer we will provide you with access to your own 'Upgrade Project Plan' with Test Drive line items as simply a part of the plan. With Sharepoint Collaborative Services you can monitor our Test Drive data conversion progress. You'll also be able to experience Sharepoint Collaborative Document Management with visibility and access what custom scripts we developed to migrate your data, our status reports, and other documents related to this project. When you do have a budgeted Upgrade Project we'll perform the remaining tasks for both sides, yours and ours, to assure upgrade success.

Managed IT Administration (MITA) Services

Managed IT Administration (MITA) Services is our group that manages our own datacenter running the latest and multiple older versions of the Ross ERP application for traditional ERP customer support. The latest versions are running to provide our Advisory Consultants who do Implementation Business Reviews and provide Upgrade ROI evaluations accurate insight into what the new version brings to customers. Of course MITA Services performs significantly more services than just managing the Ross ERP application on our own and customers' premise, so here's a quick summary of what they can provide for you!

- Collaborative Sharepoint Services that provide undiscovered collaboration opportunities such as extensive calendar management, project management, document management, business activity monitoring (workflow), and much more! (all free with your MS SQLserver database)
- Ross IT Administration evaluates the health of your Production Environment, Change Control, environment configuration and replication (test, production), service pack updates, change management, new technologies configurations with products such as Smartclient and Sharepoint.
- Availability and Recovery Services includes an evaluation of running on a hosted environment removing all server/recovery concerns, includes a disaster recovery plan and tested execution from both or individually the application and/or the database services. Provides a number of alternative approaches to medium and high availability options.
- Database Administration evaluates the health, locking, and performance of your application and database looking at current user demands. Provides Capacity Planning that aligns with future growth and technology changes. DBA Services are performed with heavily experienced and DBA Certified experts who have a deep understanding of Ross database structures and problem areas for both Oracle and MS SQLserver.
- Managed Standby Recovery environments for critical high-availability business areas with fast recovery services. (inexpensive!!!) When you need to make sure your ready to recover from hardware and/or software failure as quickly as possible losing little to no transaction data this is the service you need.

Upgrade Road Map Summary

In summary, our Test Drive offer will provide you with access to your own vanilla 6.3 SP5 Ross ERP environment that comes with an upgraded copy of your own Ross ERP data along with your choice of

what user interface to use iBrowser and/or Smartclient. All of this with no hardware worries, no environment worries, and no cost worries.

You can then chose to engage SWI for the full upgrade process, and you can also opt to leave an environment on our hosted Ross ERP server for future hot-fixes, service packs, and to have SWI introduce you to new hosted technologies and functionalities.

Upgrade Activities in More Detail

Activity 1: Project Preparation / Coordination

Our project kickoff defines assignments and customer goals. As part of the Test Drive Project the folks from MITA Services will create a login to provide your team of 6.3 SP5 Test Drivers access to the system for their review and access to our (Sharepoint) Collaboration Portal.

In addition MITA Services will provide these users with web based training on how to use the new user interface such as the new IAF SmartClient interface. This is critical to being able to fully navigate the new features and understand the new version value!

Activity 2: SWI Scenery Update

As previously mentioned Software Works will make your Test Drive a real-world trip by converting your Ross ERP data from version 5.x to 6.x SPx such that when you use the application you're familiar with the scenery. This allows you to truly focus on your task at hand and provide you with an environment to make a realistic assessment. To perform such SWI Upgrade Service will perform the following steps.

Test Drive Data Migration Steps:

1. Both companies sign a Non-Disclosure Agreement and the customer provides a copy of their database via FTP to a secure and disclosed location on our FTP server.
2. Upgrade Services will create a virtualized Customer environment on our Data Center Servers for your database upgrade and environment information.
3. Once we have the database local our Ross ERP Administration Team will evaluate the size and meta-data customizations and construct a metadata migration process. Customers with high transaction volumes will want to archive their database transactions prior to providing them to SWI. Although not required Archiving is HIGHLY recommended due to the ability of SWI to provide a save/delete/restore process to reduce the timetable of the LIVE data conversion.

Customers can request assistance to configure and perform data archiving at current SWI MITA Service rates

Activity 3: Technical and Business Review

An IBR is not required but is highly recommended at this phase of a customer's life cycle with the Ross ERP solution. As the landscape of business operations change from procedures to personnel it's most important to understand how well, or not, the Ross ERP application is supporting and benefiting your business operations. There's no sense in putting in a newly upgraded ERP solution in place if it doesn't FIT or add value to your business!

To assure a best-fit scenario and define the upgrade ROI a Business Review will provide an assessment of the business challenges using the Ross ERP application and/or where it doesn't fit the current business processes. This Business Review includes both a Technical Review and an Implementation Business Review (IBR).

Technical Review

The Technical Review includes a review of your database management, your Ross Environment and Configuration, Disaster Recovery / Availability Assessment, and Technical Education Services. Another component of the technical review is the Technical Application Review which includes a review of the

customizations and their complexity to determine a more accurate picture of total upgrade costs. In summary this review includes:

1. Technical Review
 - a. Database Management Practices
 - b. Ross ERP Environment and Configuration
 - c. Disaster Recovery and Availability Assessment
 - d. Education Services
2. Technical Application Review
 - a. This process evaluates the customizations that were performed to the CUSTOMER Ross Enterprise Applications and the effort required to port these customizations to the IAF 8.0 / Ross Enterprise 6.3 SPx development environment from the IAF 7.2 / Ross Enterprise 5.9 environment currently deployed at CUSTOMER
 - b. A document will be provided that identifies each modification, and a updated estimate on complexity of the uplift and its applicability to version 6.3's new functionality.

Implementation Business Review (IBR)

The IBR will review current version configuration and business process issues, new version and service solution features for possible process improvements, business performance analysis, ERP module utilization, security, collaborative (Sharepoint) collaborative features, and business enhancement/customization analysis, and Managed IT Service opportunities.

A rough outline of the IBR is as follows:

1. Implementation Business Review
 - a. An onsite interview with a SWI Application Consultants and/or Project Manager to review in scope transaction and note any changes requested by Customer.
 - b. CUSTOMER staff should prepare an issues list for each module included in the review.
 - c. SWI Application Consultants and Project Manager will use the issues list as a starting point to conduct interviews with the Process Champions of CUSTOMER. These interviews will be conducted along the relevant value streams of CUSTOMER. These value streams are:
 - i. Order to Cash (SOP to AR)
 - ii. Procure to Pay(POP to AP)
 - iii. Inventory (IC)
 - iv. Financials (GL)
 - v. Plan to Produce (PP/MRP to PM)
 - d. An updated draft Business Review document will be delivered to CUSTOMER that shows each change. This is normally available within two weeks of completing the onsite interviews
 - e. CUSTOMER will review the document and request any changes or clarifications. Once this cycle is completed CUSTOMER will sign off on the Business Review

Any activities specified in the IBR Results and Recommendations Report will be identified and evaluated as to their resolution and impact of the upcoming database migration.

Activity 4: Customer Environment Configured

Once the customer database is migrated then a customer specific environment is configured with the vanilla 6.x SPx version of the Ross ERP solution along with the converted database.

Access to those designated as Customer Test Drivers is provided and driving begins. You're choice of vehicles for the road trip are available as well, thin-client, ibrowser, or SmartClient. SWI highly recommends the use and significant advantages of the SmartClient!

Activity 5: READY TO GO-LIVE

In addition to the above activities to prepare for the LIVE upgrade there exists a balance of activities that must be completed. As such it is highly recommended that the customer engage SWI to perform these activities or a combination of such as listed

- Installation, Setup and Configuration of new version Application Architecture & Technology
- Ross ERP Administration Training
- Implementation /Configuration Consulting of new version feature functionality
- User training of new functionality and user productivity enhancements
- Data Migration Scripts are in place tested.
- Customizations are uplifted into the new version source code (to follow SWI Programming Standards)
- Pilot of fully configured new production environment:
 - IAF, fully uplifted customizations, with fully upgraded data
- Approval signoff of Pilot
- Go-Live Support

Road Rules: To keep your driver's license

1. Customers do NOT get to keep a copy of their converted database unless the customer engages SWI to perform the balance of the upgrade services as quoted following the IBR.
2. The Test Drive is terminated after a period of three (3) months and the database and customer environment is permanently deleted unless a customer requested extension is approved by SWI Management in writing or the customer executes any of the Managed IT Administration Services such as the Ross ERP Update Service.
3. Test Drive support is only available from 9-4 EST and can only be submitted by email unless urgent at which time customers may call the HOTLINE Support. SWI Support Consultants will provide their best-effort to return a response as quickly as possible however there is no service level agreement in place so there are not service requirements.