

XA Release 9

Migration Considerations and Upgrade Process

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Agenda

- Upgrade advice from Spence Engineering
- What is R9?
 - PowerLink + IDF Level 1 + Greenscreen
 - Functional Enhancements
 - Migration Considerations
- Migration Planning
- Installation and Migration
- Customizations
- Testing and Training
- Final Migration and Go Live

Spence Engineering- R9 Migration

Jeremiah Judson – IT Manager

1. Get management commitment for your upgrade and improvement plan, including a timeline. Communicate with management throughout the process
 - Step 1, Technical Effort
 - Step 2, Improvements for financial team
 - Step 3, improvements for operations team
2. Using CISTECH's migration package blueprint, develop a detailed technical migration plan
 - Set up education for applications that will change at R9
 - Make the users test. They don't want to, but it is necessary
3. Utilized CISTECH as an extension of our IT Team
 - Collaborated to build a tailored project plan, education, test scripts...
 - Tag team to provide user support for education and testing
 - Additional resources if required

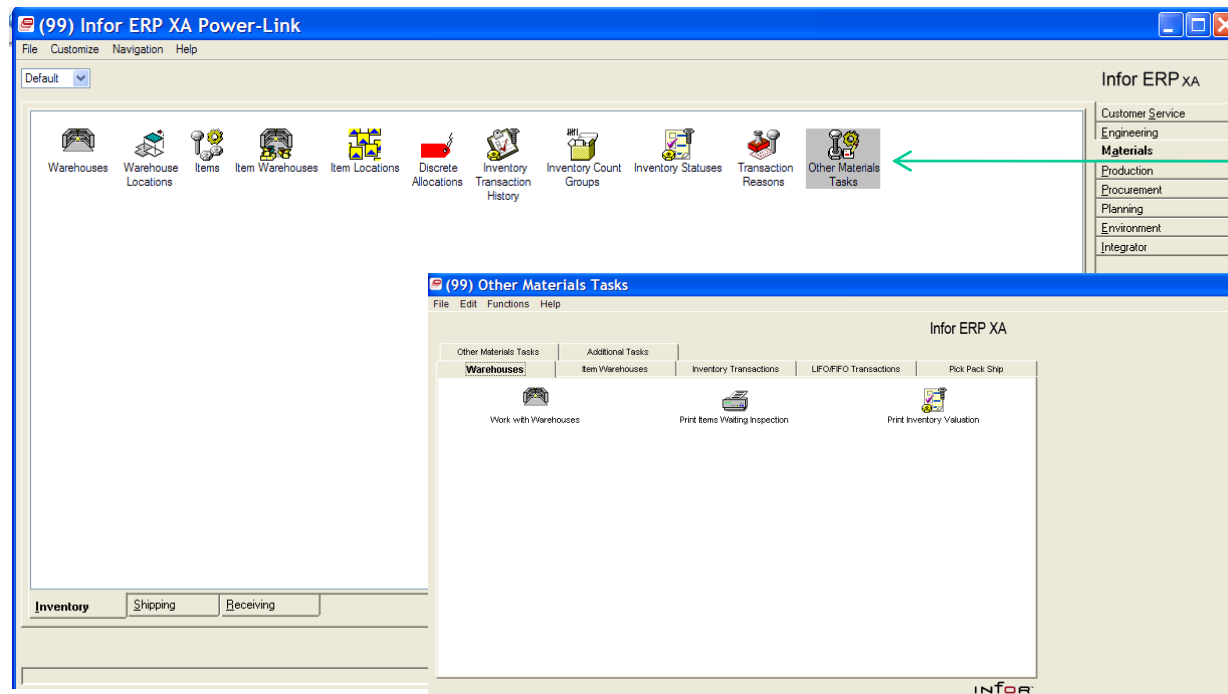
IDF Level 1

Graphical Interface to green screen functions not yet in PowerLink (IDF2)

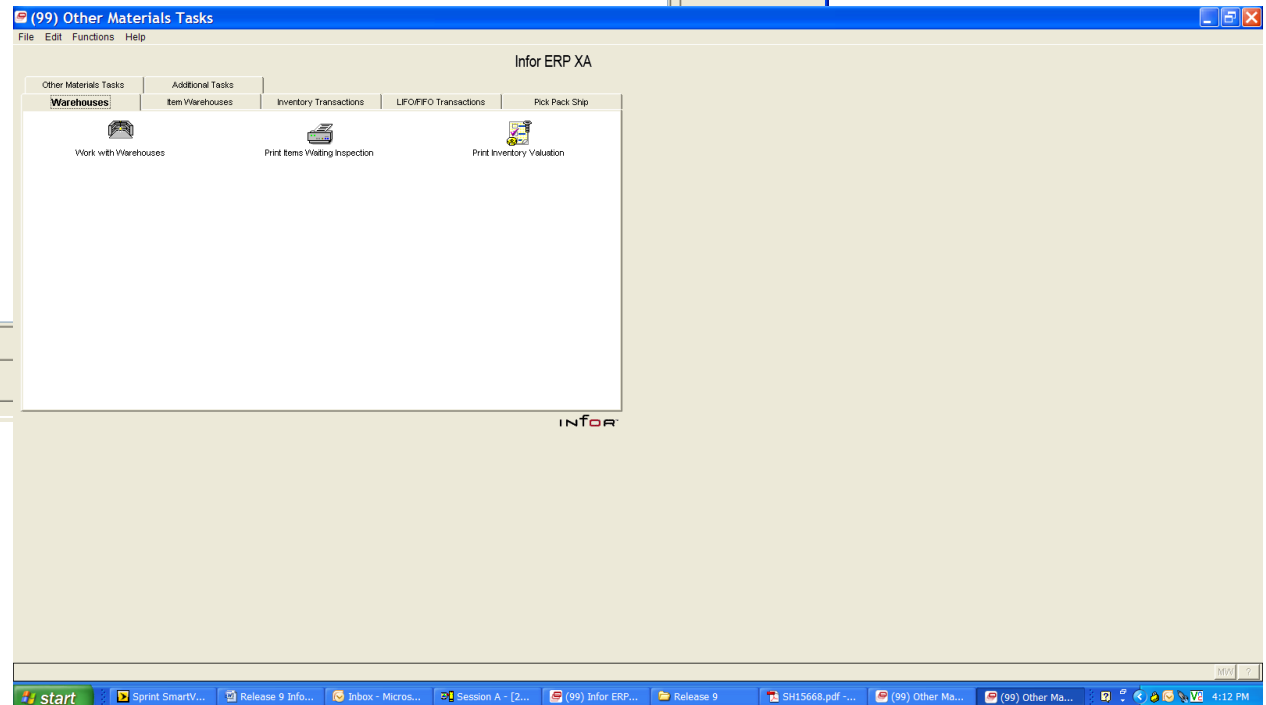
-User has one place to go!

- Limited ability to customize
- Requirements
 - Auxiliary Machine
 - Green screen and corresponding client application must be installed and interfacing
- At R9.0, IDF L1 and Green Screen are both supported

IDF Level 1



Other
Applications
Tasks



IDF Level 1

(99) Work With Warehouses

File Edit List View Functions Help

Warehouse
Position to warehouse:

WH ID	Description	WH Type	Selling WH Code	Planning WH Code	Primary Planning WH
LCI	LESLIE CONTROLS	2	0	0	1
PRO	PRO-SPEC COMSIGNED INVENTORY	2	0	0	1
Q	QUALITY HOLD AREA FOR BROWSE	2	0	0	*NONE
SUN	P-SUN COMSIGNED INVENTORY	2	0	0	1
X	FEAT COMSIGNED INVENTORY	2	0	0	1
1	WAREHOUSE 1	2	0	1	1
2	DUPONT	2	0	0	*NONE
3	STERIS	2	0	0	*NONE
4	WESTFLO	2	0	0	*NONE

Continue Exit Help

(99) Work With Warehouse Relationships

File Edit List Functions View Help

Subselt Shift+F5

Demand warehouse: LCI
Position to demand warehouse:

Relation type: Item: Planning warehouse: Action...

Demand Warehouse	Relation Type	Item	Item Description	Planning Warehouse
LCI	1	*DSF		1

Continue Exit Help

start | Sprint SmartView | Release 9 Inform... | Inbox - Microsoft ... | Session A - [24 X... | (99) Infor ERP X... | Release 9 | SH1568.pdf - A... | (99) Work With ... | 4:18 PM

Functional Enhancements-From 7.8

- EPDM
 - Item Revisions integrated across most applications
 - ‘Current’ Revision
 - Item Master files still retained
 - Controlled attributes feature
 - Item Revision Control function
 - Release Item Revisions
- CAS
 - Temporary User Definitions
 - Multiple IDF Level 1 sessions

Functional Enhancements-From 7.8

- Net Link
 - Works with multiple Internet browsers
 - View attachments
 - Additional Power Link features supported
 - Compound cards, presentation schemes, column functions
 - Restricted User Id's
- System Link
 - Restricted User Id's
 - Validation attribute allows testing without update
 - Response forwarding
 - Can be used to keep different systems synchronized

Functional Enhancements-From 7.8

- Integrator
 - New informational attributes added to business objects
 - Import/Export validation
 - Ability to lock business objects
 - Disallow compile of user exits
 - Restrict access to objects for Deployment profiles

New Applications

- CRMi-PowerLink interface
- Integration with BCD Configurator
- Material Logistics can replace ISL/MISL

Functional Enhancements-From R6

Extensive!!

All of those just discussed plus:

- PowerLink provides better user interface
- PowerLink applications add functionality
- Enterprise Integrator and SystemLink are 'gamechangers' for IT team
- For more detailed info go to Infor's 'Release Notes, Release 9'. There is a version for R6 users and for R7.8 users.

Migration Considerations

- What do you hope to achieve with your upgrade?
 - Many clients want to use R9 as a foundation for deployment of PowerLink functionality and improved process integration
- Unique XA architecture allows phased upgrade
 - Convert to R9 'as is'
 - Deploy functional enhancements and improved processes at a pace that works for you

Migration Considerations

- Determine IDF level 1 deployment
 - Modified displays or custom code will be presented using “Just in time” a screen scraper
 - XA Menus can no longer be maintained
 - User functions and menus can added to Additional Tasks tab in IDF level 1
- IDF introduces new security settings

Migration Considerations

- Planning and education for EPDM Item Revision changes and enhancements
 - Engineering
 - Procurement
- Significant IFM Changes require training-PowerLink + IDF level one
 - IFM Security changes
- Basic PowerLink training for all users

Migration Considerations

- If coming from R6 your XA Infrastructure changes
 - You need to understand Link Manager
 - Recommend Auxiliary (PC) servers for NetLink, SystemLink, IDF Level 1

2. Migration Planning

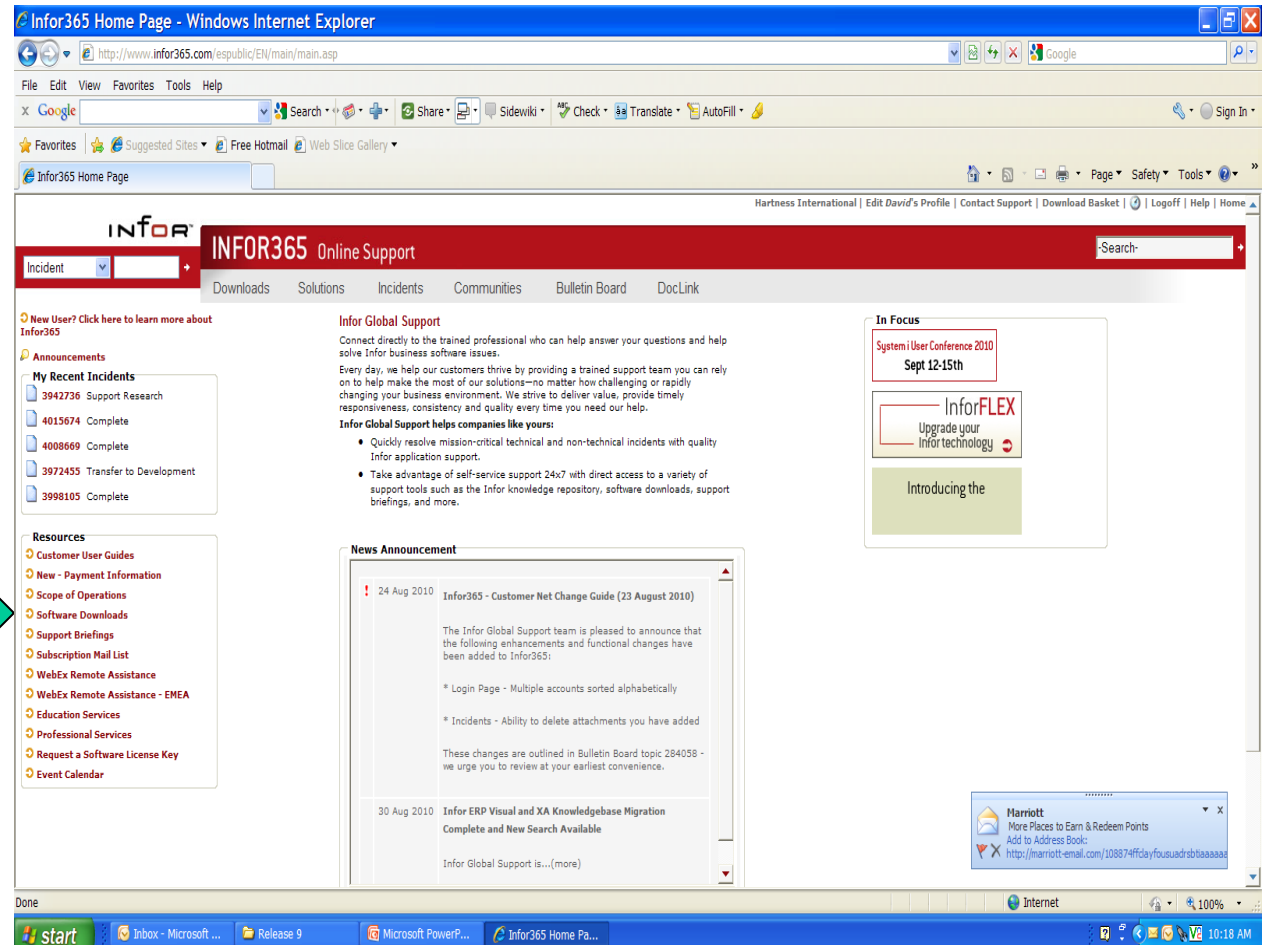
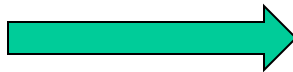
- Resources
 - SH14412 Technical Planning Guide
 - SH15668 Release Notes
 - SH15672 Database Changes
 - SH15630 – Initial Install
- Performance Analysis
- Hardware Requirements
 - Memory is your friend, PC and iSeries

Migration Planning

- Answer Questionnaire
 - Log in to Infor support web site
 - Navigate to:
 - Downloads
 - Online Ordering
 - Order Infor ERP XA, Release 9
- Obtain the Software
 - Download Center

Migration Planning

Download
Software



Log in and navigate to Enterprise Resource Planning  ERP XA R9

Migration Planning

Order CD

Download
ISO Images

The screenshot shows a web browser window titled "Infor Global Download Center : Product Download - Windows Internet Explorer". The address bar displays the URL: <https://infor.subscribe.net/control/epmy/download?element=2718513&displayDetailedLicenseQuantity=null>. The browser's toolbar includes various icons for search, share, and other functions. The website header features the Infor logo and a navigation menu with links like "Help" and "Logoff".

The main content area is titled "Infor Global Download Center" and "Product Download". It displays the product name "ERP XA Server Source - PTF 01000 SH15642". Below this, there is a section for "Order CD" with a link to "Order CD". The page also includes a "Download Manager" button and a "FTP Download" button. A sidebar on the right contains a "Software" section with links to "Product List", "Product Search", and "Infor365 Online Support". Other sections include "Administration" with links to "Account Members", "Download Preferences", and "Your Profile", and an "Information" section with links to "Download Help", "Using ISO CD Images", "FAQs", and "User's Manual".

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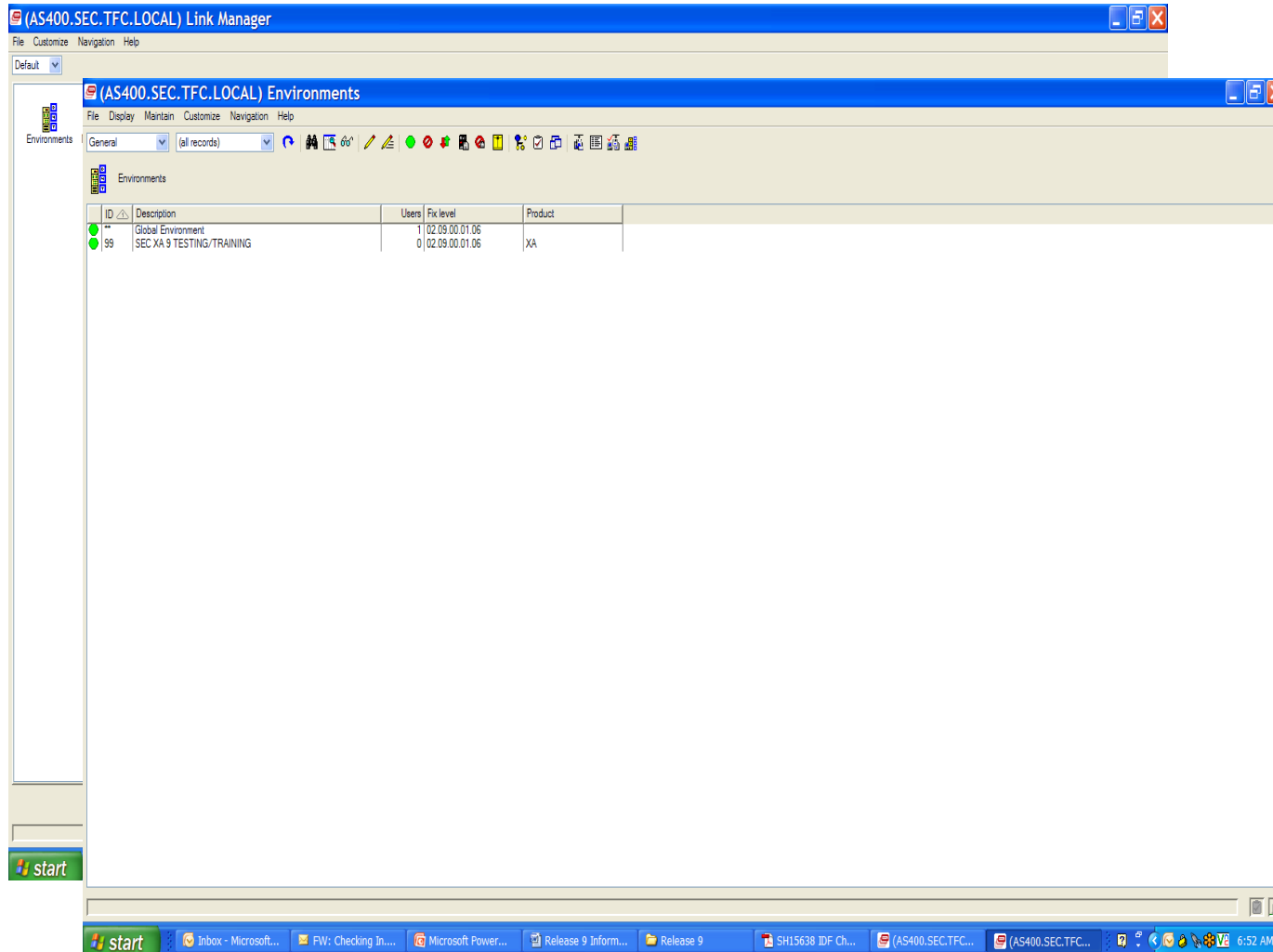
Migration Planning

- Pre-Requisites for Migration
 - i5/OS V5R4
 - Release 6
 - PCM level 5118 or higher
 - Release 7
 - Pre-Requisite PTF's
 - PCM level between 2581 and 7597
 - Release 7.8
 - PCM level 9955 or higher

3. Installation and Migration

- Pre-requisite audits and corrections
- Recent Backup XA libraries and IFS
- Perform Initial install
- Post-requisite PTF's
- Perform Data Migration
- Migration of Kit Components
 - COM/CSM and EPDM are installed and active

Installation and Migration



Link
Manager

Maintenance
and
Administration
tool

4. Customizations

- Product Update Feature
- Upgrade Analysis
- Database Changes

Customizations

7.8 Analysis for iSeries Operator.xls [Compatibility Mode] - Microsoft Excel

	A	B	C	D
1	Custom Library	Custom Obj	Obj Type	Custom Object Description
2	CISBKUP	ABCHKMOD	RPGLE	Licence check module
3	CISBKUP	ABCLMSG	CLP	Clear Program Error Messages
4	CISBKUP	ABLICMOD	RPGLE	Licence check module
5	CISBKUP	ABSMSCG	CLP	Snd Break msg to device sent as parm
6	CISBKUP	ABSNMSG	CLP	Snd Break msg to device sent as parm
7		ABVRYLCL	RPGLE	List local devices
8		ABVRYLCL	RPGLE	List local devices
9		ABVRYLCL	RPGLE	List local devices
10	CISBKUP	ABVRYLCL	RPGLE	List local devices
11		ABVRYLCL	RPGLE	List local devices
12		ABVRYLCL	RPGLE	List local devices
13	CISBKUP	ABVRYLCL	RPGLE	List local devices
14		ABVRYSTS	RPGLE	Vary local devices
15		ABVRYSTS	RPGLE	Vary local devices
16	CISBKUP	ABVRYSTS	RPGLE	Vary local devices
17	CISBKUP	AB0000C	CLP	System Verification Process
18	CISBKUP	AB0001C1	CLP	System Verification Process
19		AB0001C2	CLP	MOD - Place the Backup Job on the AS/400 Scheduler
20	CISBKUP	AB0001C2	CLP	MOD - Place the Backup Job on the AS/400 Scheduler
21	CISBKUP	AB0001C3	CLP	VRKJOBSCDE
22		AB0001C4	CLP	OVERWRITE ABCTLP TO ENVIRONMENT MEMBER
23		AB0001C4	CLP	OVERWRITE ABCTLP TO ENVIRONMENT MEMBER
24	CISBKUP	AB0001C4	CLP	OVERWRITE ABCTLP TO ENVIRONMENT MEMBER
				OVERWRITE ABCMDP TO

Analysis Results

Upgrade Analysis

Viewer - QSYSPT/42/UPGRASST/215687/QSECOFR/10.3.1.209

ID	SOURCE LINES	TYPE	LEN	N-LN NUM	O-LN NUM
I -Time : 8:40:40	Physical File : AMFLIB8 /IMHIST - M75-In	MAT=	1		
D -Time : 8:40:38	Physical File : AMFLIBE /IMHIST - Invent	RPL=	3	0000002	0000002
I -	File Creation Date : 7/09/04 Record Format N			0000003	0000003
D -	File Creation Date : 2/15 Record Format N			0000004	0000004
I -Number of Physical File Member(s): 1	Number of Logical File(s): 25	Number of Field(s):			
D -Number of Physical File Member(s): 2	Number of Logical File(s): 21	Number of Field(s):			
I -IMHIST M	7/09/04 9/01/03 23:18:06 7801	MAT=	3		
D -IMHIST	0/08/23 9/07/22 2:17:49 22935	INS=	1	0000008	
D -IMHNEW	0/08/23 9/07/22 2:17:49 0	DEL=	2		0000008
					0000009
I -WTSK 342 343 2 2 P 0	Work order task	MAT=	67		
I -Time : 8:40:40	Physical File : AMFLIB8 /IMHIST - M75-In	INS=	1	0000076	
D -Time : 8:40:38	Physical File : AMFLIBE /IMHIST - Invent	MAT=	1		
I -	File Creation Date : 7/09/04 Record Format N	RPL=	2	0000078	0000078
D -	File Creation Date : 2/15 Record Format N			0000079	0000079
D -WTSK 342 343 2 2 P 0	Work order task	MAT=	2		
I -PSTMAV 578 603 26 0 Z 0	Posted timestamp	DEL=	1		0000082
I -LSEQAV 604 606 3 3 S 0	Misc/serv item sequence	MAT=	24		
I -ORTRAV 607 608 2 A	Originating transaction c	INS=	13	0000106	
I -CDSCAV 609 638 30 A	Component item descriptio			0000107	
I -REQTAV 639 642 4 7 P 0	Required date			0000108	
I -OPRUAV 643 646 4 A	Operation where used			0000109	
I -QTEQAV 647 652 6 10 P 3	Total quantity required			0000110	
I -QPREAV 653 660 8 15 P 7	Quantity per unit expande			0000111	
I -PPSLAV 661 668 8 15 P 4	Purchase price stocking L			0000112	
I -POVLAV 669 676 8 15 P 4	Purchase overhead LC			0000113	
I -PISQAV 677 679 3 5 P 0	P.O. item sequence			0000114	
I -PUTTAV 680 683 4 7 P 0	Purge date			0000115	
I -TTKNV 684 698 15 A	Top parent token			0000116	
I -AMFLIB8 /IMHIST IMHISTF		MAT=	4		
D -AMFLIBE /IMHIST IMHISTF		RPL=	1	0000123	0000111
I -	PSTMAV A	MAT=	2		
D -	UPDDT A	INS=	1	0000126	
D -	UPDTM A	DEL=	2		0000114
					0000115
		MAT=	1		

100% SFLVIEW No group is selected

5. Testing and Training

- Test custom code
- User testing- 'conference room pilot'
- Conduct user training where needed for upgraded/enhanced applications

6. Final Migration and Go Live

- Recent backups
- Export Integrator Changes
- Download latest migration tool and re-migrate data
- Migrate CSM Kit Components to EPDM
- Convert User Definitions and Integrator Data
- Import Integrator Changes

How can CISTECH help you?

- Technical Migration Bundle
 - Fixed Price offering
 - Planning and on site assistance for migration including analysis of custom code
- Consulting Services
 - Develop roadmap to deploy enhancements to achieve business improvement
 - Education and training on enhancements

QUESTIONS?

Thank You!

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