Upgrade & patch Infor M3 with 100% confidence

A guide to successful delivery

Original Software

Start

**Ensure M3 meets
your business needs**

Prepare perfectly for
functional validation

Streamline validation
and defect fixing

Real-time test management
& communication

5 minutes to calculate
your own ROI

Ensure M3 meets your business needs

The path to Release 13.4, including patches, is perhaps the most complex and time-consuming programme of upgrades within the world of ERP.

A recent survey of M3 users agree. When asked to identify the biggest risks to an upgrade, 63% of respondents cited testing and 61% cited limited staff.
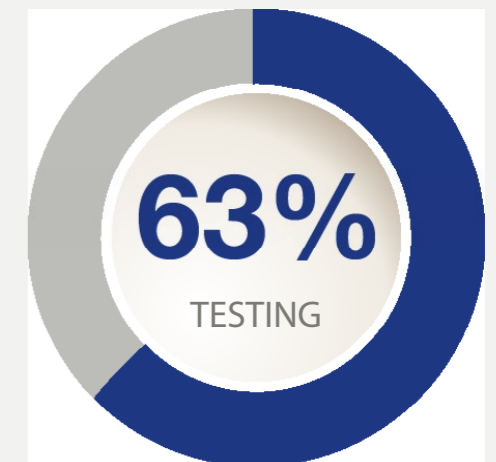
Whether you are installing, upgrading or patching M3, Original Software provides the most efficient way of validating that your application correctly supports all your mission critical business processes.

Ensure stability

Original Software's solution reduces this risk and puts M3 accounts on a stable and predictable footing:

✔ We will give you the confidence that your M3 release will support your business exactly as required from the day of go-live.

✔ Halve the time required to test functionality, reduce your project cost, and ensure you are ready on time or before.

✔ Protect and extend the ROI on your M3 application, ensuring you make better decisions, reduce costs, and increase business performance.

> Benefits of M3 Accelerator
>
> 1. Safely delivers all critical business processes
> 2. Reduce critical defects found after go-live to zero
> 3. Hit your project deadline
> 4. Reduce dependence on M3 users
> 5. Effortlessly create a detailed audit trail

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Cited as the biggest risk to an upgrade:

63%
TESTING

61%
LIMITED STAFF

› When we can help

The Original Software solution is designed to streamline your project regardless of whether you are performing an initial implementation, an upgrade (such as from 10.1 to 13.4), or releasing patches.

More frequent releases

In fact, the technology removes so much of the burden that it allows you to make more frequent releases, enabling your business to benefit from all the enhancements that Infor provides.

Quick start

It takes just a couple of days for our engineer to configure the technology and only a few hours of training for your team to become proficient in its use. You will see the benefits from week one.

Impact assessment

Combine it with our powerful comparison engine to quickly understand where there are changes in the new version, allowing you to prioritise where the most testing is needed and avoid wasting effort on areas where little or no changes have been made.
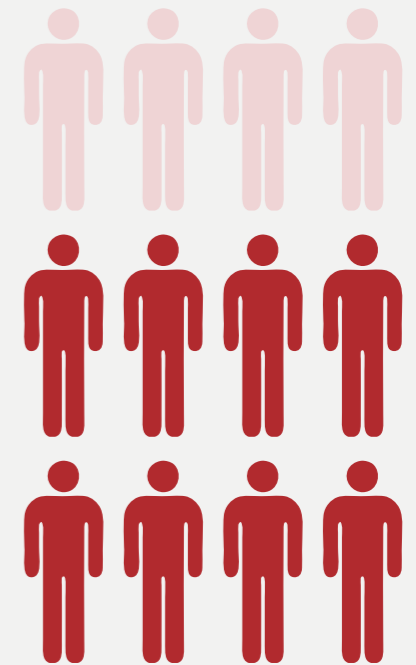
How exactly can technology impact your upgrade?

Our innovative technology solution streamlines the following key processes of your M3 upgrade project:
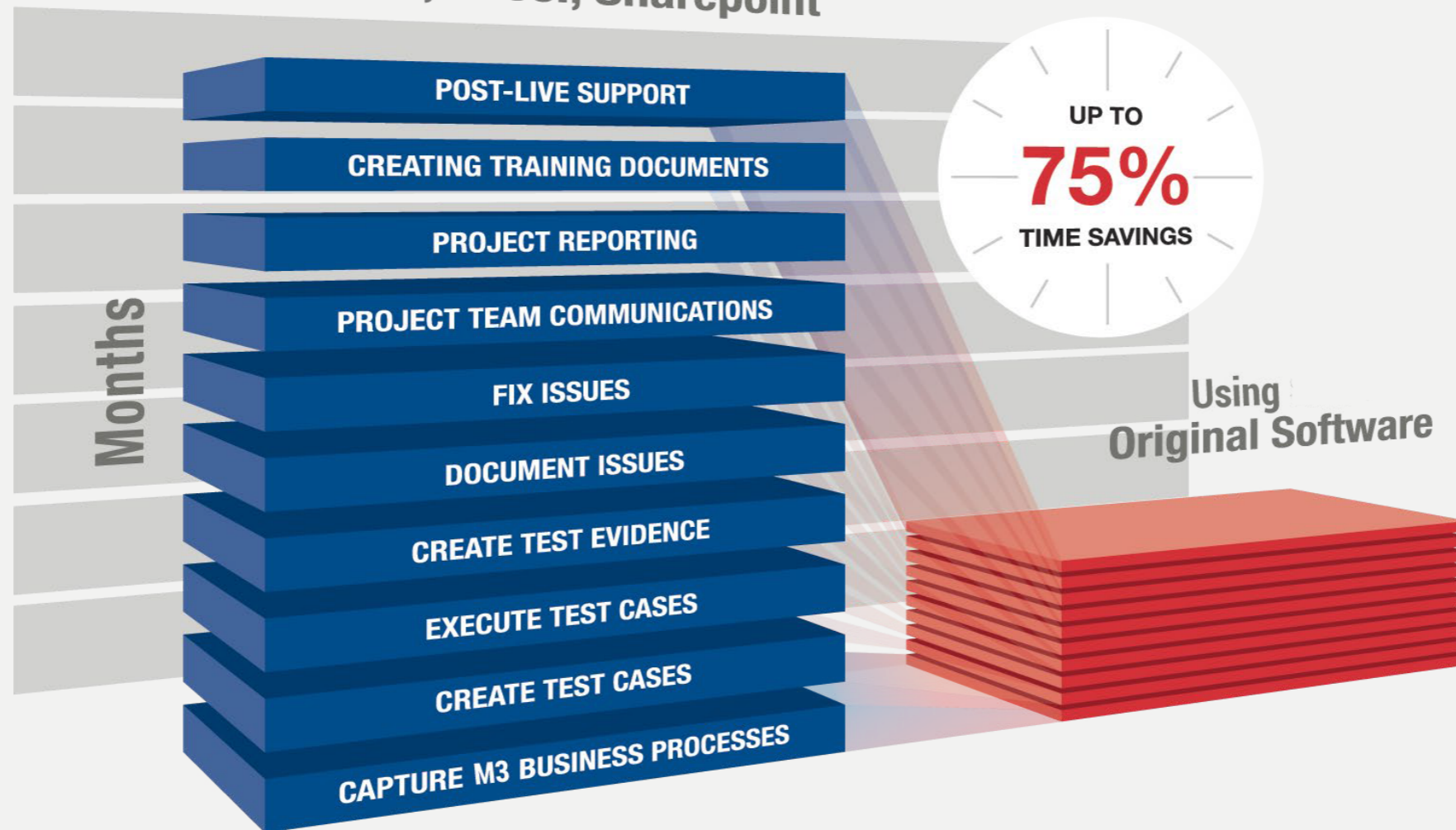
1. Project sizing & test planning

2. Validation process & defect fixing

3. Test management & communication

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Reduce project man days by **30%** and make more frequent releases

Original Software

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Cut unnecessary effort from your project

Using Microsoft Word, Excel, Sharepoint

POST-LIVE SUPPORT

CREATING TRAINING DOCUMENTS

PROJECT REPORTING

PROJECT TEAM COMMUNICATIONS

FIX ISSUES

DOCUMENT ISSUES

CREATE TEST EVIDENCE

EXECUTE TEST CASES

CREATE TEST CASES

CAPTURE M3 BUSINESS PROCESSES

Months

UP TO
75%
TIME SAVINGS

Using Original Software

Original Software

1. Prepare perfectly for functional validation

Benjamin Franklin once said, "By failing to prepare, you are preparing to fail." A fact that is as true of an M3 upgrade as of any political programme. So when you come to assessing the impact of your M3 upgrade, you may find that you have a distinct lack of documentation around how your current version is used. Which makes it impossible to fully assess the scale of the task ahead of you.

Documenting processes

If you simply rely on super-users, drawn from functions such as finance, HR, operations, to provide their viewpoint, you will only ever be able to provide a 'finger in their air' estimate of how long the testing and validation process will take. This uncertainty would make any project manager nervous, either causing timescales to be pushed out or confidence to fall.

Most companies are uncomfortable with this scenario so they decide to properly document how the system is used – at least in a number of key business processes.

This can be a highly labor-intensive and time-consuming effort, taking valuable team members away from their core functions to step through the system copying and pasting screen shots and writing descriptions of their actions into Word documents. This is a considerable task that anyone would baulk at, and takes days or weeks per module.

Automating the creation of test cases and scripts

Our solution provides a way for you to document system processes without it becoming a project in itself.

While your users go about their daily tasks in the system, our technology records what is going on – every keystroke, every mouse click, every screen.

>

> Document system processes automatically – no copying and pasting screens into Word. Save 75% of your time

75%
TIME SAVED

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› Complete library

The result is an animation or pdf of every process – a library that your project team can review and discuss to make sure that the task of validating M3 is properly resourced and scheduled.

The process documentation acts as your library of test cases and fully defined test scripts, which enables systematic and thorough testing and validation of functionality.
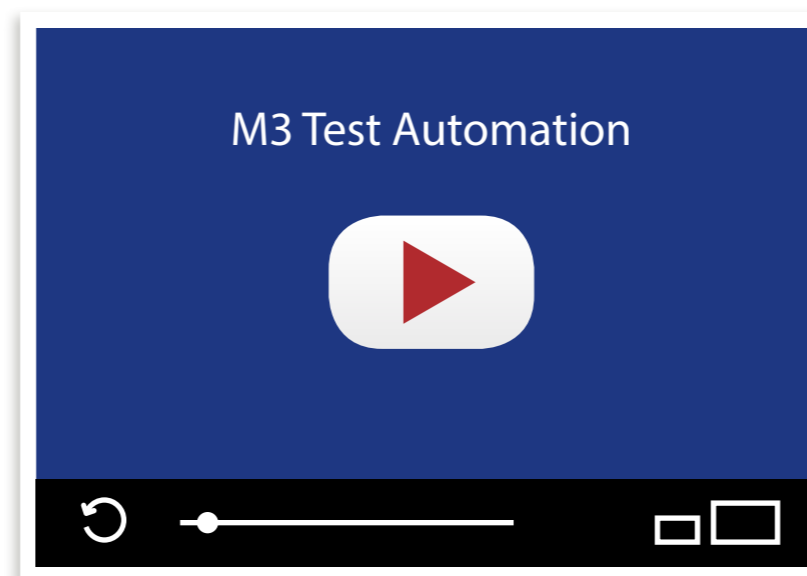
Avoid inconsistency

In the absence of such documentation, pre-defined test cases would be completely missing or at best superficial, with an inconsistent level of detail, thereby reducing the quality of the validation that your project team can perform.

But with a technology solution in place, the creation of documentation is almost effortless, enabling you to make an accurate plan of the areas you will validate.

Reduce the burden on your M3 super-users

A further benefit is that subsequent stages of the project will be less dependent on super-users. With fully detailed test scripts in hand, validation of the upgrade can be performed by other people, enabling the project to proceed in a more timely and cost-effective fashion.

M3 Test Automation

> " Systematic and thorough testing and validation of functionality with less dependence on M3 users. Save 70% of your time.

2. Streamline validation and defect fixing

If your validation processes are manual, they will take a long time. User acceptance testing (UAT) will be labor-intensive and draining. Your M3 users will find it difficult to get away from their day jobs for the significant chunks of time required.

Under a manual process, when users find an error in the application, they will have to go back, try to replicate it, copy and paste screen shots into Word, and type in a description of what they did when the error occurred.

Then they will email the document to a developer or upload it to a file-share. The developer will review the document and try to replicate the error, but the document may not contain enough information to do so, in which case a conversation will be necessary. Hopefully the developer can now replicate the error and can go ahead and fix it.

When the fix is ready to be tested, it will have to go back to the original super-user who identified the error as they will be the only person that has a hope of replicating the exact scenario that caused it. The whole process is long-winded and ineffective.

Eliminate process steps to increase productivity

Our solution provides a more efficient way. In fact, we eliminate a number of the above steps altogether.

As the super-user works through the test script, our system automatically records all M3 and user activity. So when an error is found the user can simply mark up the recording with a note.

The details are automatically attached to a defect record, which appears in a developer's or manager's queue, along with an email alert.

No need for the super-user to step back and reproduce the error, no need to manually describe everything that was going on. Neither does the developer have to attempt to recreate the error, or liaise with the super-user – they

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Time savings of 75% on executing tests and 95% on documenting issues

95%
TIME SAVED

Original Software

› simply play back the animation and get on with fixing it.

Minimal impact

The overall impact of the improved process is that more errors are addressed, quality and speed improve, and super-users minimise time away from their core role.

But as significant as these improvements are, this approach is still fairly manual.
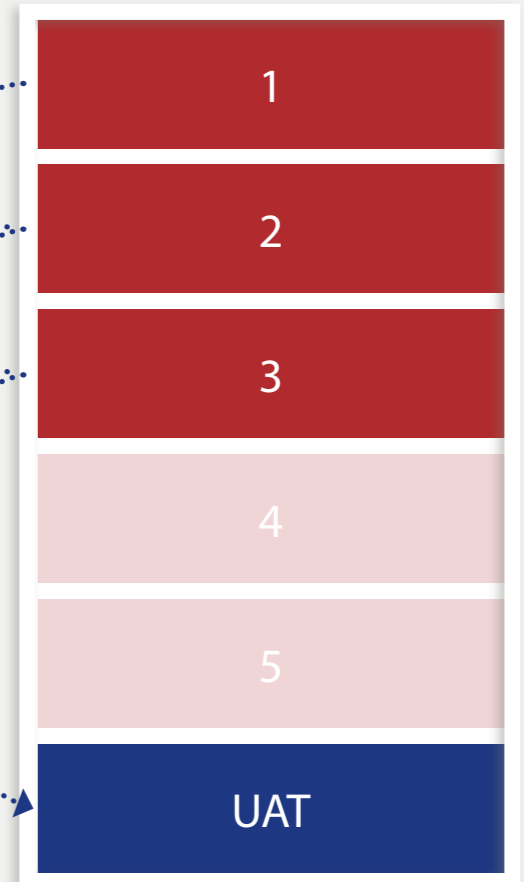
Jump to light speed

As you move through the first and second upgrade testing process steps, there is a significant amount of repetition of test scripts to ensure that areas of the system that have been validated as correct have not since been de-stabilized by changes made elsewhere.

Instead of your users performing this repetitive work manually, our technology can handle it automatically.

Literally hundreds of scripts can be executed at the touch of a button. The time savings can either be used to help meet project deadlines or reinvested to increase the scope of your testing and final application quality.

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Reduce the number of manual steps required

| 1 |
| 2 |
| 3 |
| 4 |
| 5 |
| UAT |

3. Real-time test management & communication

An M3 upgrade is a big deal. The testing and validation program will typically involve dozens of individuals from across the business from various departments and time zones.

If your project manager is relying on email and spread-sheets to keep tabs on each project member's progress then this can become a highly time-consuming and frustrating process.

In fact it may take days to compile a project status overview with any sort of accuracy – with the further drawback that by the time it is compiled it is already out of date.

This is hardly the way to manage a mission-critical upgrade to your core ERP applications. And it can seriously hamper your project manager's ability to respond to keep the project on track, provide visibility to others, and earn the confidence of senior executives.

Keep your project on track

With a suitable technology platform in place, the situation is transformed.

Now your project manager has immediate access to a real-time overview of testing progress. Graphs and dashboards make the information easy to understand and share with business leaders. Project managers can dive down into any test case or test result, identify tasks that are behind schedule and re-allocate them to other team members.

In fact the system serves as the repository for all test assets – plans, cases, scripts, and results – and the hub for all team members to access and perform their tasks.

With improved visibility, the project manager can better ensure that all the necessary tasks are performed, allowing them to identify all critical defects before go-live.

Compliance evidence

For companies operating in highly regulated industries, being able to demonstrate you have properly tested your applications is critical. In the past, you may have had to rely on the word of

the person who performed the testing, but now you will be able to show a recording of the actual tests.

Accelerate user training

The final benefit of creating process documentation is that it constitutes ideal collateral for training new users of M3. In so doing, it further reduces the time demands on super-users for training sessions and refreshers, and quickly bringing all users up to a high level of productivity and job satisfaction.

> "
> Create detailed audit trail automatically

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We are confident our solution can help you deliver a high quality outcome to your M3 project while accelerating the process and optimising resources. We are also sure you can realise significant cost savings.

Based on our customers' experience, we have developed an Infor M3 calculator that can quickly and clearly show you the likely cost savings and return on investment you would gain from deploying our solution. Challenge us to calculate your own ROI.

Your ROI report

Adobe PDF

Original Software

Who we are

The Original Software M3 solution dramatically reduces the effort required to ensure your enterprise applications meet the changing needs of your business. Thousands of knowledge workers and IT professionals around the world use it to streamline processes such as user acceptance testing, manual and automated testing, project tracking, and regulatory audit of applications. The software provides the

fastest way to capture and share business processes, validate application functionality, and communicate real-time project status. You can apply it to any data-centric application. Our customers report their productivity doubling, tripling, quadrupling – or better – enabling them to deliver functionality more frequently and meet strategic objectives more rapidly.

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