Upgrade your Unit4 solution
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The Digital Revolution.
Reshaping life and business.

All around us, the impact of the Digital Revolution is clear. In devices, in apps, even in cars that lift the burden of driving from us – innovation is everywhere.

The Digital Revolution has also affected the way organizations operate. New models and capabilities have given rise to newer and better ways of working. With these improvements come rising customer expectations.

Organizations that wish to succeed need up-to-date applications that enable them to face these challenges head on.

The latest version of the Unit4 solution helps you unlock the best from your team and adapt to new opportunities and challenges – faster, more cost-effectively, without disruption.

The solution leverages the latest innovations of the Digital Revolution, such as predictive analytics, digital assistants and bots, to transform complex information into smart information. It makes the concept of “Self-Driving ERP” a reality, empowering your people to focus on the tasks that matter, collaborate better, and make informed decisions.

The new version brings multiple upgrade opportunities:

- **Empowered Finance Planning**: Reduce manual routine work and focus on high-value activities.
- **Smart Team Work**: Spend less time responding to client requests and create more productive teams.
- **Successful People Management**: Eliminate rigid structures and support employee career growth.
- **Add Modules or Users**: Add additional modules or users (on existing modules).
- **Add New Capabilities**: Add an entirely new line of business capabilities.
Unlock the power of new innovations

Why upgrade?
Upgrading to the latest version brings significant advantages to your business, your users, your IT team, and your system administrators. Your organization will experience greater value from the latest capabilities, updates, technical improvements, and innovations released since your implementation or last update.
Upgrading delivers results...

...but don’t just take our word for it! Here’s what IT and Finance professionals told us about upgrading to our previous release:

**Early adopters experience significant business benefits and additional cost savings**

[The new release] is easier to use and more intuitive. Our staff are being innovative and looking at the best use of the product. If you just maintain the status quo, you don’t benefit from what the software offers,”

*Heather Paul, Whistler’s Corporate Services IT.*

**Early adopters experience significant productivity improvements**

Before [upgrading], our staff struggled to stay on top of work they didn’t have time for; now we have been able to reallocate resources to other tasks, such as data analysis,”

*Ken Roggeman, Whistler’s Director of Finance.*

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**Better for your business**

- Optimize your business through the new “Self-Driving ERP” innovations, dramatically improving processes around HR, Payroll, Budget, Procurement, Expense-, Time-, Absence-Management and many more functions
- Leverage best-practices through industry templates out of the box
- Deploy your solution as you wish – whether in cloud, on-premise or a combination. It’s *Cloud at your Speed!*  

**Better for your users**

- Provide a superior user experience through the latest mobile technology and the Unit4 Me app
- Enhance collaboration across departments and throughout your entire organization with the latest social capabilities to build new digital communities
- Reduce the time your staff spends on administrative tasks by introducing greater self-service capabilities
- Empower your people to effectively involve stakeholders to respond to ad hoc information requests.

**Better for your IT and System Administrators**

- Increase performance, security, and control by keeping up to date with technology standards and support across operating systems (OS), browsers and mobile
- Reduce customization and support costs by retiring legacy customizations and leveraging new standard functionality
- Benefit from the new Unit4 People Platform and the leading-edge technology from Microsoft Azure, when you run your business in the Cloud.
The Upgrade Program

Upgrading to the new Unit4 solution is easy from any version your organization is running. You choose the upgrade program that matches your organization’s unique needs and requirements:

**Program 1**

The fastest route to reduce system support cost

*Like-for-Like Upgrade*

A “like-for-like” technical upgrade of your software to the newest release, with minimal changes to your existing configuration and processes.

**Program 2**

The smartest route to give your business a new edge

*Superior Capabilities*

The standard “like-for-like” upgrade plus selected module enhancements, which provide additional benefits and superior capabilities to improve your entire business.

**Program 3**

The most comprehensive route to perform at the highest level

*Superior Business Processes*

Implement the new capabilities, and at the same optimize your processes to achieve significant business, process and performance improvements.

Transition into the Cloud

Flexible deployment is a unique capability of Unit4’s “Cloud at your Speed” concept. We make migrating between on-premise and cloud a simple, straightforward process, without compromising performance. You can choose to transition to the cloud in the configuration that matches your organization, no matter which upgrade Program you prefer.

[www.unit4.com/cloud](http://www.unit4.com/cloud)
The Global Upgrade Team

Unit4 has operations and distributors around the world for easy, local access to sales, service and support, including: Argentina, Australia, Austria, Belgium, Brazil, Cameroon, Canada, Chile, Colombia, Congo, Czech Republic, Denmark, Ecuador, Equatorial Guinea, Estonia, Ethiopia, Finland, France, Gabon, Germany, Guatemala, Hungary, Iceland, Indonesia, Ireland, Italy, Ivory Coast, Kenya, Malaysia, Mexico, Morocco, Netherlands, New Zealand, Norway, Peru, Poland, Portugal, Senegal, Shanghai, Singapore, South Africa, Spain, Sri Lanka, Sweden, Switzerland, Tanzania, Togo, UK, USA and Venezuela.

This approach provides multiple benefits:

- Perfection through practice and usage of standardized methodologies ensures quality and a smooth upgrade experience
- Collaboration across all Unit4 upgrade specialists allows for a high-level of best-practice experience sharing among a global customer base
- The global team leverages economies of scale, particularly for traditionally scarce expert skills

The Unit4 global upgrade team consists of the following experts:

<table>
<thead>
<tr>
<th>Upgrade Experts</th>
<th>Optimization Experts</th>
<th>Training Experts</th>
<th>Support Experts</th>
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<tbody>
<tr>
<td>Ensuring a smooth and transparent upgrade process by applying a proven methodology that detects and focuses on areas of attention</td>
<td>Providing expertise to optimize your system from both a technical and business perspective to maximize the value of your investment</td>
<td>Providing guidance on how to best use the software via a portfolio of onsite and online training programs</td>
<td>Providing focused assistance and advice to ensure smooth operations of your Unit4 solutions</td>
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Introducing the Unit4 Upgrade Team

Upgrade Experts

What’s our vision?
We want to ensure your project is planned with the maximum care, and to provide end-users with all the knowledge and expertise necessary to assume full control of the solution.

How do we achieve this?
We apply services methodologies based on internationally accepted standard techniques, proven effective over hundreds of upgrades. Our team of international experts and partners will guide you through the migration process to:

• Perform a full upgrade impact assessment based on your current environment
• Provide technical upgrade support
• Support application upgrades
• Train your users to smoothly migrate and to benefit from the new versions
• Review of your business processes and reports to increase performance
• Provide new test tools to help you testing the different Business Processes

Upgrade Optimization Experts

What’s our vision?
We want you to gain the full potential of the advanced technology and functionality contained in the latest version.

How do we achieve this?
We provide a global team of dedicated business and technical experts to work with you. We will collaboratively build and maintain high-quality administrative and process-focused solutions based on best-practices to help you meet your unique business challenges, and help you to seize new opportunities. These services include:

• Providing a full health checkup of your solution
• Performing a full upgrade impact assessment based on your current situation
Upgrade Training Experts

What’s our vision?
We want to accelerate user adoption and to ensure every employee in your organization makes the most of your Unit4 solution.

How do we achieve this?
Our professional trainers offer courses where you can learn from those with significant experience working with our software. As members of a global training team, our best-practice upgrade unit provides best-practice knowledge, tips and tricks, which has been accumulated from every single upgrade we provide for our global customer base. Our teams collaborate and draw on the experience of our consulting and training professional partners, as well as offering extensive knowledge of the latest product releases and technologies. Our upgrade training experts will help your users:

- Understand the full range of capabilities of the latest version of our software
- Maximize the return on your upgrade quickly and extending into the future
- Speed benefits you see from new features and improved processes
- Assisting your teams with training for end-users

Our local training centers can discuss the options available to you as part of the upgrade process. Contact Us to learn how you can start your Program.

Upgrade Support Experts

What’s our vision?
We want to solve any problems or queries that you experience with your new version of our products quickly and effectively, and with the creation of the Global Upgrade Program (GUP), there have been some big improvements in this:

- A flexible and deployable worldwide team with one methodology
- Providing a complete program assessment prior to the upgrade so you know exactly what you’re getting.
- We’ll analyze your business processes and provide helpful advice around risk, focus and testing.

How do we achieve this?
We provide a network of local and global support centers around the world. Unit4 ensures professional support services tailored to meet the level of assistance needed based on your requirements and available in-house resources.

In addition, we offer numerous online resources (e.g. product knowledge-bases and extranets) to provide a wealth of helpful information and self-service assistance for our customers.
Discover the benefits...enjoy the ride!

Explore the Outcomes

- Explore all the new capabilities and online product tours on ERP.Unit4.com

Educate Yourself

- Contact us to see results from current customers.
- Work with Unit4’s experts on a value assessment tuned to your specific organization

Plan the Optimal Program

- Work with Unit4’s experts to identify the upgrade Program that fits you best
- Understand how your team and Unit4’s experts can work together
- Start planning and set a start date

Experience the Difference

- Perform the upgrade program of your choice
- Train your key people on the new system’s capabilities
- Enjoy the ride
For example, staff identified things that were ‘nice-to-haves,’ but Unit4 was able to fix them in less time than it took to describe them.”

Heather Paul, Whistler’s Corporate Services IT.
Which Upgrade Approach is Right for you?

Program 1
The fastest route to reduce system support cost
Like-for-Like Upgrade

Superior Capabilities

Program 2
The smartest route to give your business a new edge

Program 3
The most comprehensive route to perform at the highest level
Superior Business Processes
Program 1
The fastest route to reduce system support cost

What you can expect:
This package is for customers who are seeking a like-for-like technology upgrade only, and who do not intend to implement additional functionality/services. The new solution gives you the freedom to move your solution forward at your own pace.

How to prepare
Before the upgrade, Unit4 will provide a technical and functional assessment of your current environment, which can be performed remotely or on site. This gives you a great insight into the changes taking place, and how we can help mitigate risks.

How you will benefit
A technical upgrade to the new version ensures you remain on a supported version, and it provides a stepping stone to future benefits without introducing any major changes to configuration and processes. You can keep the modules and capabilities you’re already using or upgrade them with the newest version. You can also introduce new capabilities to match your business needs.

Program 2
The smartest route to give your business a new edge

What you can expect:
This package includes a like-for-like upgrade to the latest version, as well as implementation and rollout of selected Business Process changes such as new modules and capabilities.

How to prepare
Before the upgrade, Unit4 will provide a technical and functional assessment of your current environment, and review business requirements for all the new capabilities you intend to introduce. We recommend on-site support for this stage.

What are the benefits?
Through the implementation of capabilities and new user interfaces (both Web and mobile), your organization will realize significant efficiency improvements.

Program 3
The most comprehensive route to perform at the highest level

What you can expect:
This package provides a comprehensive health checkup for your entire solution. It enables the system to be tuned in line with your current workflow, to match your organization’s evolution since the initial Unit4 implementation. The package covers the like-for-like upgrade and rollout of selected capabilities, as well as providing all required tuning of your processes, reports, and infrastructure.

How to prepare
Before the upgrade, Unit4 will provide a technical and functional assessment of your current environment, a business requirements review for new capabilities, and comprehensive health checkup of your environment. This can integrate with your organization’s technology roadmap, or our Unit4 optimization experts can provide their experience as part of a larger business review. We recommend on-site support for this stage.

What are the benefits?
By implementing superior business process, you will be ensured your existing Unit4 solution continues to meet your organization’s evolving needs, and that you are set to perform at the highest levels.
Step-by-step project plan

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<tr>
<th>Assessment</th>
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<th>Production Environment &amp; Sign Off</th>
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<td>Plan</td>
<td>Build</td>
<td>Test</td>
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<tr>
<td>Design</td>
<td>Deploy</td>
<td>Close</td>
</tr>
<tr>
<td>Support</td>
<td></td>
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</tbody>
</table>

- **Pre-Project Preparation**
  - IA Signed
- **Project Planning**
  - Impact Analysis Gateway
- **Test Environment**
  - Create Technical Infrastructure
  - Create Test Environments
  - Setup Remote Access
  - Copy live Database To Test Environment
  - Setup New Version and Upgrade
  - Update Localization
  - Update Customization
  - Upgrade Reports
  - Upgrade Interface
  - Create Test Plan
  - Training to Key Users
- **Production Environment & Sign Off**
  - Check Technical Operation After Upgrade
  - Perform Integrated System Testing (IST)
  - Perform Basic Business Testing (BBPT)
  - Deliver Test Environment To Customer
  - Review Checklist and IA
  - Key Users Testing
  - Test Customization (UAT)
  - Test Environment Agreement
  - End-User Training
  - End user Testing
  - Test Support
  - Go Live Agreement / Approve Current Plan
  - Deploy Gateway
  - Go Live
  - Go Live Support
  - Delivery Gateway
  - Future Recommendations and Testing

**Activity key**

- Checkpoints
- Project
- Customer
- Functional
- Technical
- Functional / Technical
- If Applicable
- Customer Support

Upgrade to the latest Unit4 solution
The next steps to upgrade

Explore all the new capabilities and online product tours at ERP.Unit4.com

Call your account manager:

- Take part in events or watch the webinars to see results from current customers
- Plan to engage Unit4’s experts on a value assessment tuned to your specific organization
- Identify which upgrade Program fits you best with Unit4’s experts
- Understand how to prepare and how to collaborate with Unit4’s experts

Learn from the experience customers have already built on their Program upgrading to the latest version. We understand your business requirements, we can answer any questions you may have, and we can provide you with supporting documentation on all the functional and technical changes that you will consider during your upgrade.

We look forward to welcoming you on your new Program!
About Unit4

Unit4 is a leading provider of enterprise applications empowering people in service organizations. Unit4 delivers ERP, industry-focused and best-in-class applications. Thousands of organizations from industries including professional services, education, public sector, non-profit, real estate, wholesale, and financial services benefit from Unit4 solutions. Unit4 is in business for people.