
Lawson Upgrade Methodology

**7.2.4 to 8.0.3 Application Upgrade
7.3.3 to 8.0.2 Server Technology Upgrade**

2003

Introduction	3
Planning Phase	6
Upgrade Strategy Session.....	6
Upgrade Planning Session.....	6
Hardware Assessment & Sizing.....	7
Modification & Interface Assessment.....	7
Design Phase	8
Business System Evaluation.....	8
Prerequisite Upgrade Set-up.....	8
Project Team Training.....	9
Application Exploration.....	9
Business Procedure Review.....	11
Construction Phase	12
Acceptance Test Planning.....	12
Non-Lawson Server Technology Upgrade.....	12
Lawson Server Technology Upgrade.....	13
Preliminary Application Setup.....	15
Application Data Upgrade.....	16
Finalize Application Setup.....	17
Interface and Modification Re-Deployment.....	18
Security Design.....	19
Acceptance Testing.....	19
Business Strategy Session.....	20
Activation Phase	21
End User Training.....	21
Readiness Assessment.....	22
Perform Cut-Over.....	22
Acceptance Sign-off.....	23
Production Support.....	23
Roles	24

Introduction

Lawson offers a wide range of implementation assistance, including training, application and technical consulting, software installation, performance audits, etc. Most of these services are priced on a per-day, time and materials basis. A Lawson Services representative will meet with your project team during a future implementation discussion to understand the scope of your project and provide a training and consulting cost estimate for your review.

Upgrading to Lawson's 8 series of products will provide Lawson Clients with a single gateway to personalized information needed to make informed decisions. The Lawson Portal is a single point of navigation to all Lawson application interfaces, consolidates disparate sources of information, and is designed for easy personalization and customization. The Lawson Portal provides a foundation for companies to create a flexible work environment and an online corporate community for fostering employee relations. In addition to the Portal, Lawson Clients can now leverage the application and technical enhancements and new product offerings to further save time and money.

Lawson Software provides a proven methodology, packaged services and accountability for taking Lawson clients to the next level of product functionality and technological advances.

Lawson hires experienced application and technical personnel with significant industry experience and best practices. Our consultants have an average of four years of Lawson Consulting expertise combined with an average of 10 years overall industry expertise. **Our people are the experts on Lawson Software** with specialization in upgrades and a number of our software products as well as related software products. For over 27 years, we have structured our implementation approach around knowledge transfer. This was designed to make you the experts after "go live". Should the need arise, we have direct access to all levels in the organization. It's important to know that **as your vendor and upgrade partner, we are committed to your successful upgrade.**

Types of Consulting

Visit-based consulting is where Lawson's consultants will meet with the Lawson Clients project team at critical steps in the implementation to assist them with making the best setup, design, and process decisions for Lawson Clients business. This option provides Lawson Clients with a cost effective Lawson implementation while leveraging Lawson's consulting expertise. Many of our clients have selected this option for this benefit. Higher commitment from internal resources is needed.

The *full-time consulting* option provides clients with a faster time to value. By utilizing Lawson Consulting resources on a full-time basis, the applications are implemented faster to provide Lawson Clients with the benefits to recognize increased productivity and efficiencies sooner. Lower commitment of internal resources is needed.

Project Team Training Options

Lawson has both public training and onsite training. *Public training* is structured training in a training room environment held at one of Lawson's Regional Offices. Lawson's regional offices are: Atlanta, Boston, Calgary, Chicago, Columbus, Dallas, Denver, London, Irvine, St. Paul, New York, San Francisco, Seattle, Toronto and Washington, DC. Lawson recommends that a minimum of two users attend each class recommended. The

number of days per class may vary but technical classes average three days and application classes average five. The cost for application classes is \$550/day/user and technical classes are \$825/day/user.

Onsite training is also another option. Onsite training is conducted at Lawson Clients facilities in a classroom environment with a customized curriculum. This option is the most cost-effective for groups of six or more as long as the environment is structured for hands-on education. The cost of this option is \$3,600 per day for up to 12 users. For groups of three or less, the cost per day is \$2,100.

Lawson also offers *web-based training* about key applications and features.

Lawson Upgrade Strategy

There are two distinct pieces of the Lawson 8 Series upgrade. Below is a description of each and the following pages provide detail for the typical tasks and services that Lawson provides for clients.

- **Server Technology Upgrade**

Lawson Technical consultants can assist Lawson Clients to correctly define the project scope, timelines, and costs of the Server technology upgrade. The Server technology tasks fall into the planning, design, construction, and activation phases of the Lawson Upgrade Methodology. The recommended technical services are described in the following pages. The technical services proposal provides the consulting days recommended for each of these tasks, as per the assumptions listed in the proposal

- **Application Data Upgrade**

The recommended strategy is to utilize the Lawson Upgrade Software Programs to perform the data migration/ upgrade of the Lawson data. Lawson will assist Lawson Clients to correctly define the project scope, timelines, and costs of this upgrade project. The procedures we will follow are outlined in Lawson's Upgrade Methodology. Lawson's Upgrade Methodology includes four primary phases to the Project Plan. Below is a representation of the four phases and specific activities in each. Lawson's Upgrade Services provide consulting and education at various points in the project and also provides the technical consulting days recommended in each of the four major project phases for a Lawson Upgrade, as per the assumptions listed in this proposal.

The basic steps of this project are as follows:

Planning Phase

- Upgrade Strategy Session
- Upgrade Planning Session
- Technology Planning Session
- Hardware Assessment & Sizing
- Interface & Modification Assessment

Design Phase

- Business System Evaluation
- Prerequisite Upgrade Setup
- Project Team Training
- Application Exploration
- Business Procedure Review

Construction Phase

- Acceptance Test Planning
- Non-Lawson Server Technology Upgrade
- Lawson Server Technology Upgrade
- Preliminary Application Setup
- Application Data Upgrade
- Finalize Application Setup
- Interface & Modification Redeployment
- Security Design
- Acceptance Testing
- Business Strategy Session

Activation Phase

- End User Training
- Readiness Assessment
- Perform Cut-over
- Acceptance Sign-off
- Production Support

Planning Phase

Upgrade Strategy Session

The Lawson Upgrade Engagement Manager starts this session with a project kick off. They review the Lawson Upgrade Methodology with the Lawson Clients project team to establish a baseline understanding of all phases. They then conduct a strategy session with the <Client's> Executive Sponsors and Project Manager to develop a project charter that incorporates the project vision. The project scope and goals are confirmed.

Objectives

- Review Upgrade Methodology
- Confirm project scope and goals
- Define Project Charter

Deliverables

- Upgrade Project Charter

Upgrade Planning Session

The Lawson Upgrade Project Manager will work closely with <Client's> Project Manager to finalize the team structures, review the change order management process, and establish a communication plan. A draft of the education and upgrade consulting plan will be developed.

Objectives

- Finalize team structures and communication plan
- Review the change order management process
- Review the course from the current state to the desired state
- Determine if there will be any pre-project upgrades required, and if so, include them in the Upgrade Project Plan
- Incorporate into the Upgrade Project Plan all modifications that will require attention during your upgrade
- Incorporate into the Upgrade Project Plan all interfaces that will require attention during your upgrade
- Identify the <Client's> project team members to attend each class
- Prepare a draft training plan

Deliverables

- Upgrade Project Plan
- Training Plan

Hardware Assessment & Sizing

Assess your current hardware configuration and determine if it will be capable of providing adequate response time and batch run-times after completion of your upgrade. This task will also determine if you have enough available hard-disk space to perform the upgrade (usually 3.5 times the amount of disk currently used). Consultants will work with you to accurately complete our Disk-Sizer questionnaire. This questionnaire will be used to recommend a server configuration specifically for your organization.

Objectives

- Identify projected hard-disk space necessary to perform the upgrade.
- Identify whether your current server(s) will be adequate after the upgrade is completed
- If new hardware is recommended, determine whether the new hardware should be obtained just prior to go-live or it should be obtained as soon as feasible. If accurately projecting downtime is a primary concern, possibly the test upgrade iterations should be performed on the new hardware.

Deliverables

- Hardware Recommendation

Modification & Interface Assessment

During the Planning Session visit various modifications and interfaces that you have will be investigated to determine what impact the upgrade process will have on them. Focus will be placed on attempting to eliminate or minimize modifications if at all possible. It's possible that a modification can be eliminated due to new or expanded functionality within the newer application. There may also be the possibility that a modification can be logically recreated using one of the Lawson presentation layer tools (i.e., Design Studio) and thereby eliminate it from the core Cobol code.

Your interfaces will also be investigated with similar attention to elimination or minimizing. If you have licensed Lawson's Business Component Integrator (BCI) product, each interface will be investigated to determine if it is a candidate for implementation via BCI as opposed to the previous method.

Objectives

- Identify all modifications and interfaces that will require re-deployment or at least testing as part of the upgrade process
- Create a scope statement for each modification or interface to be used to determine the amount of effort required to re-deploy

Deliverables

- Modification and Interface Re-Deployment Plan

Design Phase

Business System Evaluation

Performing a Business System Evaluation is the first step in your solution design. Rarely are all problems discovered and resolutions known before your initial implementation. The Business System Evaluation will allow Lawson Clients and Lawson to address during the upgrade any requirement changes that may have developed. It will assure Lawson Clients that they are getting the maximum benefit from the Lawson products they purchased. More importantly, it helps identify action items that should be considered during your upgrade to bring your Lawson system into full alignment with your business objectives and performance expectations.

Objectives

- Investigate benefits achieved and identify requirement changes and potential improvements so they can be addressed during the upgrade. Many times the new functionality from your upgrade provides a sound solution to existing problems.

Deliverables

- Report that outlines benefits that Lawson Clients has achieved and recommendations on ways Lawson Clients can get maximum benefit from the products they purchased.

Prerequisite Upgrade Set-up

Lawson supports upgrades from selected release versions to other selected release versions. Often, you will need to perform small upgrades, or cyclical, in order to get to a supported “starting point”. A Technology Consultant can assist your staff in applying upgrades, cyclical, or patches, to Lawson products and complementary technology products.

Objectives

- Complete an outline of all pre-upgrade tasks necessary to get your server to a supported “starting point” for the upgrade

Deliverables

- Server completely prepared to begin the upgrade tasks

Project Team Training

Lawson's proposal includes those classes/training modules (i.e., Web-Based Training) identified herein. They represent the training that is currently available from Lawson and is recommended in order to upgrade your current applications and understand the latest technology and application features. For each class, participants will review objectives, learn how features fit into an overall system, discuss underlying concepts, review step-by-step procedures, and complete exercises and hands-on training.

Lawson training may be conducted at a Lawson regional training facility, according to our published schedule of public training classes, or on-site at a Lawson Client's facility. On-site training attendance is limited to a maximum of twelve people per class. On-site training requires a facility conducive to providing the proper learning environment. Any on-site classes at Lawson Clients facilities will require a minimum of one workstation per two attendees; that the training system is prepared with data; that the system is stable; and that an IS representative from Lawson Clients responsible for administering the system is onsite for the duration of the class in case of system problems.

Objectives

- Learn how to manage, maintain, and support the technology components that enable Lawson's business solutions.
- Understand differences of newer applications

Deliverables

- Training manuals provided for each training class Lawson Clients attends.
- Project team appropriately trained and ready to take advantage of latest product set-up considerations and product features.

Application Exploration

This step occurs after <Client's> project team has received their product differences training. It is used to enhance Lawson Client's understanding of the new Series 8 Lawson functionality by creating solutions to Lawson Client's business issues with this added functionality. Our consultants will work onsite with your team to provide hands-on support to test setup and processing examples on the installed system. This activity provides the Lawson Clients project team with a starting point for adhoc exploration on Lawson's Series 8 applications and the ability to practice what they have learned in training.

Objectives

- Reinforce the new Lawson Series 8 functionality presented at Project Team training
- Provide hands-on guidance during exploration to help Lawson Clients understand open questions from training classes

Deliverables

-
- Lawson Client's completion of Application Exploration exercises.

Business Procedure Review

Business Procedure Review is the step in which the Lawson Clients project team members will investigate the new release for changes and enhancements. They will determine how they will utilize the new release. Issues identified during this review will be resolved by developing workarounds, procedural changes, or system enhancements, if any. Upgrade set up recommendations will be made based on the new procedures and new functionality being instituted. They will begin to develop scripts, utilizing the new program names and features, for the acceptance testing.

During this step, the Lawson consultant will make recommendations on data reconciliation processes, assess the user interface, and develop criteria for readiness assessment.

Objectives

- Investigate new release for changes and enhancements.
- Provide starting point for creating test scripts used in acceptance testing.
- Resolve system issues.
- Document procedures.
- Design Upgrade Setup.
- Recommend data reconciliation processes.
- Develop criteria for readiness assessment.

Deliverables

- Enhancements are identified and documented.
- System issue resolution.
- Documented procedures.
- Data reconciliation process document.
- Readiness Assessment criteria document.

Construction Phase

Acceptance Test Planning

Lawson consultants will work with Lawson Clients in developing the overall requirements for the acceptance test. We will jointly examine testing objectives, techniques, and tools.

Objectives

- Determine Acceptance Test success criteria and create an Acceptance Test Plan
- Obtain stakeholder sign-off on test plan
- Prepare test scripts to be used in Acceptance Testing

Deliverables

- Facilitate acceptance test workshop to identify test requirements and strategies
- Assist Lawson Clients Project Manager with the creation of an Acceptance Test Plan, included procedures, data required and user participation
- Provide acceptance testing strategies and recommendations
- Lawson Clients to create 8.x test scripts

Non-Lawson Server Technology Upgrade

During this task, all software products that Lawson depends on will be upgraded to the appropriate versions. The newest versions of Lawson's products have wide ranging dependencies on complementary products, such as the operating system, RDBMS, webserver, servlet engines, Perl, Java, Cobol compilers, C compilers, etc. Prior to beginning to upgrade the Lawson server technology components, the server must be prepared by upgrading where appropriate or installing a complementary component that is new to your infrastructure. The Lawson Technology Consultant will assist your staff in upgrading or installing all necessary components. They will also assist your staff in understanding how to manage and maintain this array of components in order to keep them all functioning properly, not interfering with one another, and keeping them all properly patched and current.

Objectives

- Complete understanding of all non-Lawson server-based technologies in preparation for upgrading Lawson

Deliverables

- Server completely prepared to begin the upgrade process for Lawson products

Lawson Server Technology Upgrade

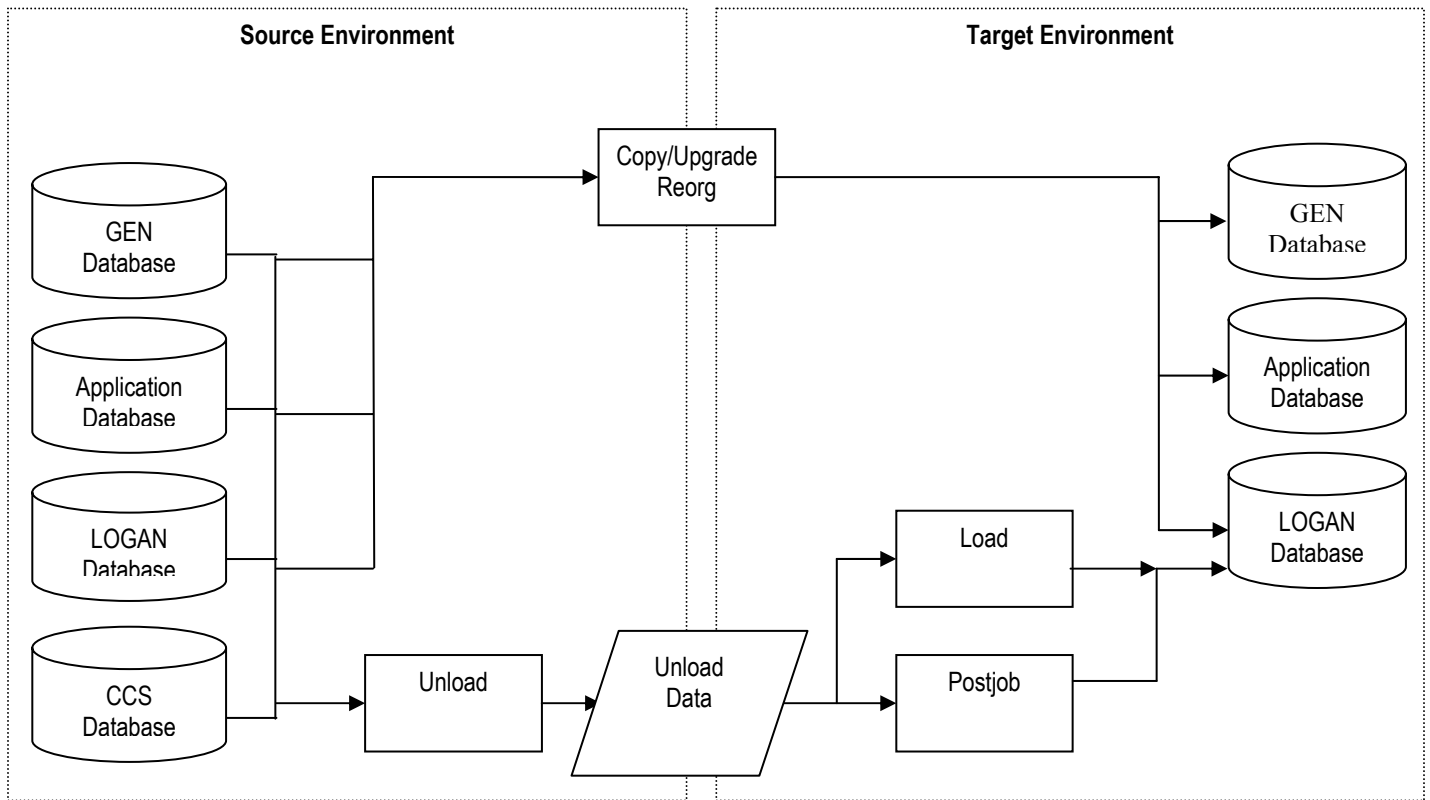
Lawson delivers many components to enable all of the business solutions that a client may have licensed. Server Technologies refers to the following:

- Lawson Environment and the GEN database
- Application product lines (source code, not data)
- IOS (previously known as Logan) and the Logan product line
- CCBASE and your CCS product line(s)
- All Lawson software components that are installed on the webserver

During this task, the Lawson Technology Consultant will work with your staff to upgrade all of the Lawson Server Technologies. Depending on your "starting point", this may include steps to fold the CCS product line into the Logan product line (note: previously, the Logan and CCS product lines were installed and managed as 2 distinct products lines, but going forward the data contained therein will be housed in a single Logan product line). While this task entails installing and upgrading several products, the function that requires careful scrutiny is the migration of the data that is currently in the GEN database, the Logan product line, and the CCS product line. Care must be taken to ensure that the data comes across completely and accurately in order to eliminate the need for recreating data after the upgrade process. It is highly recommended that Lawson assist with the process to define this scenario, since the movement of a Lawson Environment and its components is not something typically accomplished by a Lawson client.

To accomplish this task there are three options available; after reviewing the system setup and other considerations, the following may be recommended:

1. Two environments on separate machines: (1) production, (2) source and target.
 - The production product line stays in your current environment. A new environment is copied then upgraded/installed and a copy of production (source) is made in the new environment on the other machine. The new applications (target) are then installed into the new environment. The upgrade actually occurs between the source and target product lines in a single environment.
2. Continue to run your production product line in the current environment.
3. Copy and Upgrade/Install the new environment.
4. The copy of your production product line in the new environment will be your source product line.
5. Install the 8.0 applications in the same new environment. This is your target product line.



At the completion of this task, your server will be ready to begin the process of the Application Upgrade where the application datasets will be upgraded.

Objectives

- Complete understanding of all Lawson server-based technologies in preparation for upgrading Lawson

Deliverables

- Server completely prepared to begin the application upgrade process for Lawson products

Preliminary Application Setup

Lawson consultants will work closely with Lawson Clients to accurately answer the application setup questions asked during the Application Data Upgrade process. Any decisions will be documented.

Objectives

- Perform necessary application setup while running the upgrade program

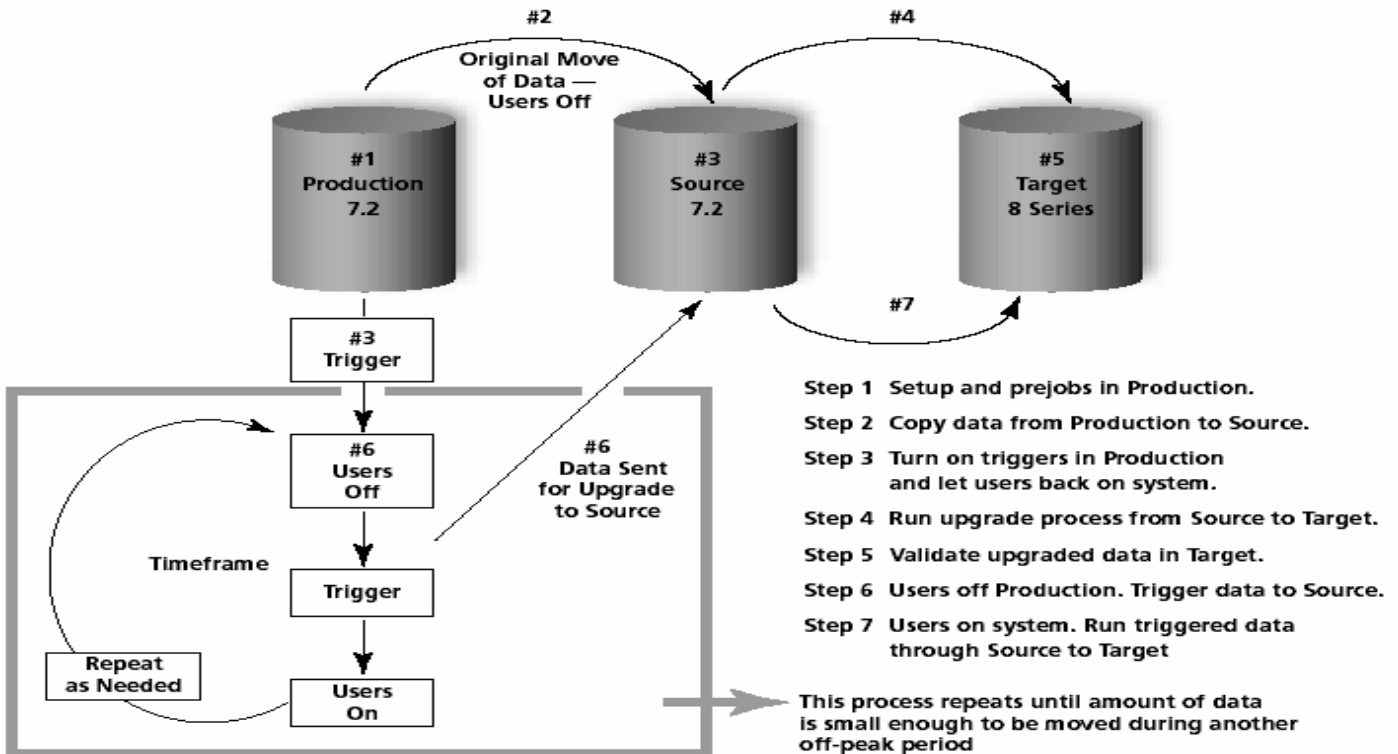
Deliverables

- Answer application set up questions during the Application Data Upgrade process.
- Setup changes are documented

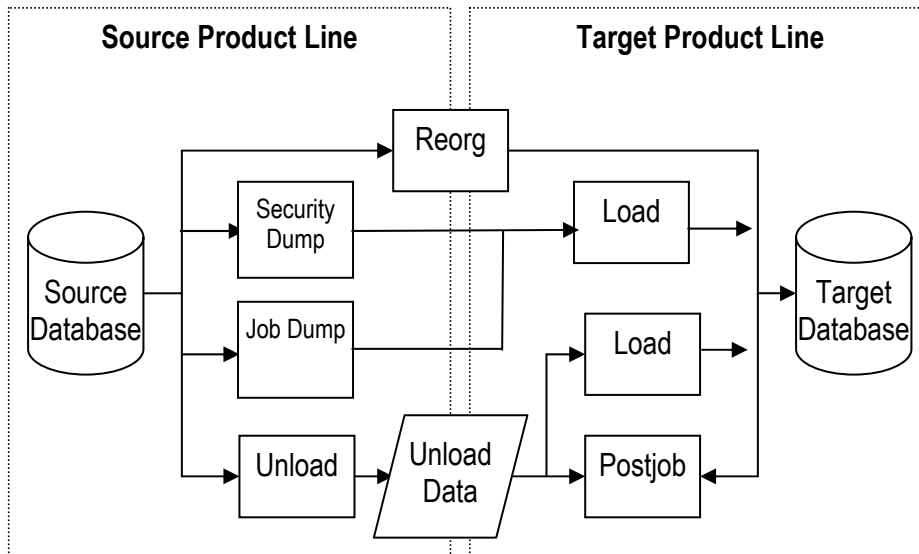
Application Data Upgrade

This task is where your actual application data will be processed through the use of the upgrade programs to transform the old version data to the newer version data structure. This task is typically the longest to complete.

There are two process options that can be used to upgrade your application data. One option is to use Lawson's Upgrade While Active approach that will reduce <Client's> downtime during the upgrade. This option utilizes triggers in Lawson's Environment to identify the records that have been changed in the production database and stores them separately in the database. This is a repetitive process that is executed against the triggered data. The data is then migrated through the upgrade programs and stored in the newer version data structure.



The second option is to use Lawson's upgrade programs to migrate data onto a test server and eventually the production server. It is recommended that the data be run through the upgrade programs 2 to 4 times, depending on the results. The option does require a system outage during the duration of the data upgrade execution. Remote assistance is available in performing the subsequent 2 to 4 iterations after the initial Test.



Finalize Application Setup

Lawson Clients will perform application set up for the Lawson Series 8 applications according to the results of the Business Procedure Review. If this set up differs from the Lawson Series 7 setup, any changes will be documented.

Objectives

- Perform Lawson Series 8 application set up according to the results of the Business Procedure Review

Deliverables

- The Lawson Series 8 application set up is complete
- Setup changes are documented

Interface and Modification Re-Deployment

One of our guiding principles will be to attempt to eliminate custom interfaces and modifications where possible. As Lawson's application engines move from version to version, many new features and functionalities are included in the application as delivered. If your interface or modification has made it into the base application, then your modification can be retired. Alternatively, if your modification can be moved from Cobol code to a presentation layer tool, then we will recommend investigating re-implementing the capability via one of those tools as opposed to implementing via Cobol code.

Interfaces and modifications can be very extreme and can have a tremendous impact on the overall timeline for the upgrade project. It is important that they be thoroughly analyzed early on – particularly if the interface and/or modification includes any database structure changes as these can impact the functioning of the application data upgrade programs from the previous task.

Re-deployment can range from simply testing an interface or modification that has been brought forward to a complete development cycle for an interface/modification that effectively has to be re-created. The scope of this task ranges significantly from client to client. It is impacted by the number of modifications, the complexity, and the development methodology that was applied, for example, batch job vs. on-line form, etc.

Careful change control measures must be utilized in order to insure that everything gets moved to production correctly and completely.

Objectives

- All interfaces and modifications re-deployed on the new versions, tested, and ready to migrate to production or eliminated

Deliverables

- List of known interfaces and custom programs defined on <client's> system
- Migration Plan for moving to production as part of the Perform Cut-Over task

Security Design

During this task, the Lawson Technology Consultant will work with your Security Administrator in order to make sure that they have a thorough understanding of how all of the various levels of Lawson security work. The consultant will also assist your administrators in modifying existing security classes or creating new ones where applicable. We will explain how Lawson's security administration utilities allow for easier migration of security classes from one environment to another, making it easier to truly test security on a test environment and then migrate it to your production environment.

Objectives

- A thorough understanding of the capabilities of Lawson security and how best to leverage its capabilities to secure your Lawson installation

Deliverables

- A comprehensive Security Plan which is easily implemented via Lawson's standard security tools and requires minimal maintenance to create your desired level of security

Acceptance Testing

Our application consultants will assist Lawson Clients in running the simulated production runs. Components of this Acceptance Testing may include: business processes, volume testing, stress testing, and system administration procedures. The test scripts prepared in the Acceptance Test Planning stage will be used here.

Objectives

- Executed Acceptance Test
- Review results of Acceptance Test

Deliverables

- Onsite support during acceptance testing and assist with validation and issue resolution

Business Strategy Session

Our application consultants will assist Lawson Clients in evaluating the results from the Acceptance Testing. Based on the outcome of Acceptance Testing, decisions around setup and processes may need to be re-evaluated to achieve desired results. Readiness to move on to the next phase is also determined.

Objectives

- Evaluate documented test scripts used during Acceptance Testing
- Revisit set up and process decisions, if necessary, to achieve desired results
- Obtain business unit/department acceptance sign-off

Deliverables

- Documented test scripts with results used in Acceptance Testing
- Summarize test script processes that did not yield desired results
- Document adjustments to set up or processes
- Business unit/department acceptance sign-off

Activation Phase

End User Training

End user training is a necessary and important step towards the successful upgrade of your system. For conducting the actual training of the end users, we recommend the “just in time” philosophy; that is, conduct the training just prior to going into production. That way, the end users do not forget everything they learned when it is time to use the knowledge.

The amount of training for a user is dependent on that users job responsibilities. Classes can be as short as one hour in duration or can be a day.

The most cost effective approach to end user training is “train the trainer”. This is where the Work Team Leaders leverage the knowledge they have obtained throughout the upgrade including any new products to train the end users. This proposal assumes this approach unless otherwise noted. Our customers typically prefer this approach, but Lawson can assist with this task if desired.

Objectives

- Identify training plan for end users
- Create training manuals incorporating the test scripts used for acceptance testing
- Successfully conduct end user training on the differences between Series 7 and Series 8 along with any new products

Deliverables

- Lawson Clients to create an end user training plan
- Lawson Clients to create end user training manuals
- Lawson Clients to conduct end-user training

Readiness Assessment

This is conducted in a meeting setting prior to cut-over. The purpose is to review the upgrade plan and verify all tasks are complete. Lawson's consultants will identify with the project team any incomplete tasks and prioritize their importance to the cutover date.

A decision for production will be made and contingency plans for the live cutover will be made. Lawson will assist the Lawson Clients Project team in providing a Readiness Assessment Report for the Lawson Clients Steering Committee.

Objectives

- Complete Readiness Assessment report
- Work with Lawson Clients Project Manager to identify outstanding tasks and estimated completion dates

Deliverables

- Readiness Assessment report

Perform Cut-Over

During this task, Lawson will support your staff in performing the actual upgrades on your production server(s). All of the work prior to this point has been performed on a "test environment". It has been documented thoroughly, and is basically executing on the production server in a manner that should create few unexpected results. The production server upgrade should proceed according to plan and on the scheduled timelines.

Objectives

- Complete upgrade of all components and data on the production server(s)
- Testing completed and server ready for end-user access

Deliverables

- Lawson and all related software products upgraded to target versions on the production server(s). All applications and databases upgraded and tested in preparation for end-user access

Acceptance Sign-off

The acceptance sign-off is a step where Lawson Clients approves that upgrade objectives were accomplished and Lawson Clients is satisfied with the results.

Objectives

- Obtain Lawson Clients approval that upgrade objectives were accomplished
- Lawson Clients is satisfied with results

Deliverables

- Acceptance document is signed by <Client's> stakeholders

Production Support

Lawson should provide an onsite consultant to assist your staff should any surprises come up in the first few days after going live on the upgrade.

Objectives

- Provide the assurance that if anything should arise, the correct resources are available to remedy the situation

Deliverables

- Expertise available as a safety measure as long as you deem it necessary

Roles

A key component in a successful upgrade is to define the individuals that make up the project team.

Lawson Clients Team

The Lawson Clients Team should include an Executive Steering Committee, Lawson Clients Project Manager, Work Team Leaders for each application areas, and Technical Support.

- **Executive Steering Committee** – Without proper vision and guidance from a company's executives, many projects fail to reach their desired goals and objectives. The role of the Executive Steering Committee will be to participate in setting the goals and scope of the project and to participate in periodic status meetings with the project team.
- **Lawson Client's Project Manager** - A Project Manager will be assigned with appropriate decision-making authority. This person will oversee all project activities. These will include staffing the project with the proper resources, preparing and monitoring the project plan, attending project team training for functional and selected technical classes, setting project priorities and assigning tasks, identifying and documenting project issues and providing status reports on the project to the Executive sponsors. This person is usually very familiar with cross-functional requirements and upper management's goals and has the ability to lead a team of people from various departments. Although this person may be very knowledgeable of certain functional areas they should not be assigned specific responsibilities for completing the activities associated with one or more applications. These responsibilities should be assigned to and reside with the Application and Technical Work Teams that are described below.
- **Work Team Leaders** - These resources will be considered part of the core project team and will participate in tasks including Project Team training, Business System Evaluation, Business Procedure Review, Acceptance Testing, and Production Support as deemed necessary by the Lawson Project Manager and the Lawson Clients Project Manager. Often these experts consist of Application Leads in their respective areas of expertise (i.e. General Ledger, Accounts Payable). The resources designated for these roles should have a good working knowledge of how Lawson Clients processes are performed in Lawson and understand the reasons for the current processes. As part of the upgrade process, these resources will be evaluating the new functionality available and how best their organization can utilize these.
- **Technical Support** – A team of technical experts that will be involved in the technical duties that come with a Lawson Upgrade. Examples include system administration, database administration, web administration, printer administration, and software patches.

Lawson Consulting Team

The Lawson Consulting Team provides consulting resources for training, planning, technical consulting and application consulting as follows:

- Engagement Manager
- Upgrade Project Manager
- Application Consultants
- Technology Project Lead
- Technology Consultants

Lawson's Field Consulting Division will assign an Upgrade Services Team to work with the Lawson Clients project team during the upgrade process. Lawson will assign Project Leads, Application Consultants and Technical Consultants skilled in Upgrade activities. These individuals are adept at implementing and upgrading the Lawson Server Technology products as well as the installation, setup and execution of the application data upgrade programs. These individuals also provide application expertise to assist Lawson Clients with leveraging the Lawson functionality to further automate business processes. These Lawson resources provide core competencies and skills and are Lawson subject-matter experts. The Lawson organizational Project Team structure is as follows:

- **Lawson Engagement Manager (if applicable)**

The Lawson Engagement Manager (EM) plays an integral role in the upgrade process. The primary function of the EM is to establish and maintain a positive customer relationship at the executive level. The EM serves as the primary agent in helping Lawson customers achieve their strategic goals including the successful implementation of the Lawson products. The EM will foster and maintain a positive relationship with all parties working on the Lawson implementation including client executives, partner executives, and the Lawson Project Manager.

The Engagement Manager will be responsible for the following activities:

- Coordinate the Upgrade Strategy Meeting, Upgrade Planning Meeting, and the Technology Planning Sessions
- Stakeholders are defined.
- Key responsibilities are:
 - Assist Lawson Clients in determining the objectives, goals and scope of the upgrade project
 - Ensure Lawson's Project Manager and Lawson's Technical Project Manager understand the objectives, goals and scope of the upgrade project
 - Issues: Escalate documented issues that are logged with the Lawson GSC (as needed)
 - Communicate potential deviations from the project scope that may impact the objectives, timeline and or cost estimator
 - Provide Change Management (if required)
- **Lawson Upgrade Project Manager**

The Lawson Upgrade *Project Manager* is an integral and necessary role in the Upgrade project. The "PM" works directly with Lawson Client's Project Manager to plan, execute, and monitor the Lawson

upgrade. The Project Manager will assist in developing a detailed specific Upgrade Plan that encompasses learning the enhancements in the upgrade, developing new and changed procedures to take advantage of the additional Lawson features and assuring data integrity through systematic and documented testing. The Project Manager will advise and recommend what needs to be accomplished in what sequence and with which resources. The PM will schedule Lawson's upgrade activities as well as help the Lawson Clients Project Manager coordinate any additional activities needed for the upgrade.

The Project Manager will be responsible for the following activities:

- Coordinate and participate in Initial Upgrade Planning Meeting
- Assist in determining the objectives, goals and scope of the Upgrade Project
- Manage the scope and goals of the project to insure a reference able, on time and on budget project.
- Prepare initial Project Plan for the Upgrade Project
- Manage the actual expenditures to the budget to insure an on budget project
- Work alongside the Lawson Client's Project Manager in planning and managing the upgrade where appropriate
- Work in conjunction with the Lawson Technical Project Manager while focusing on the application side of the upgrade
- Ensure that the Lawson Application Consultants understand the objectives, goals and scope of the Upgrade Project
- Assign Lawson resources based on skill levels and project dynamics
- Manage Lawson resources during the Upgrade Project
- Provide an escalation contact for Lawson Clients at Lawson during the Upgrade
- Create and obtain approval for Change Order requests

- **Lawson Technology Project Lead**

The Technology Project Lead will work primarily with the Lawson Project Manager and the Lawson Client's IS team. The Technology Project Lead will take ownership of and manage the technical side of project, including planning, execution, and monitoring of the upgrade.

The Project Lead will be responsible for the following activities:

- Coordinate and participate in Lawson Upgrade Planning
- Assist Lawson Clients in determining the objectives, goals and scope of the technical aspects of the upgrade project
- Prepare initial technical tasks for the Lawson Upgrade project plan
- Work alongside Lawson Clients in planning and managing the technical upgrade
- Work in conjunction with Lawson Clients focusing on the technical side of the upgrade
- Ensure that the Lawson Technical Consultants understands the objectives, goals and scope of the Upgrade Project
- Assign Lawson technical resources to complement the needs of Lawson Clients and manage Lawson's technical resources during the Upgrade Project
- Provide a technical escalation contact for Lawson Clients at Lawson during the Upgrade
- Assist Lawson Client's Project Manager reviewing and revising the technical project plan
- Assist Lawson Clients in reviewing priorities, goals and scope and evaluating progress

- **Lawson Application Consultants**

The Lawson Upgrade Project Manager will direct skilled *Application Consultants*. These individuals will be assigned to your Upgrade Project based on specific industry, hardware, software and application knowledge and experience. The Project Lead can also call upon other resources within the company and outside of Lawson as necessary.

Application Consultants are Lawson product "specialists." They provide consulting for upgrade training, design, testing and production. Application Consultants working on an upgrade project also may assist in data validation and upgrade set up requirements as needed. Application Consultants have a concentrated knowledge base in related applications and provide Lawson expertise in our core competencies to assist Lawson Clients during the Upgrade Project.

An example of some of the key tasks the Lawson Application Consultants will perform are as follows :

- Provide public and private training on the differences between the current and new version of Lawson products and the required upgrade setup
- Through onsite work with Lawson Clients, gain an understanding of the business's organizational structures and processing requirements in order to make recommendations to Lawson Clients to best take advantage of Lawson's new and changed features and functionality
- Assist Lawson Clients in understanding the new and changed Lawson features and applying them to the business needs and processes at Lawson Clients
- Assist Lawson Clients in setup and design to achieve the desired processing results
- Recommend business procedures to increase efficiency and functional use of the application

- Assist with additional report mapping, design and writing due to new and changed features
- Provide support to Lawson Clients in initial test upgrade setup requirements
- Support Lawson Clients in creating, running and documenting structured application tests corresponding with each test of the technical upgrade to validate the upgraded data and the new or changed business procedures

- **Lawson Technical Consultants**

Lawson Technical Consultants provide services that address many of the IS needs of our clients. These services include several that may be of assistance in an upgrade scenario. One example is the system administration tasks required to create a production environment on both the server and the desktop. Lawson Technical Consultants can assist in the process of creating additional product lines for the upgrade and copying production data as needed. Lawson also provides consulting on data-access techniques and can recommend and implement report writers to address new and changed reporting and inquiry needs in the upgraded product.

An example of some of the key tasks the Lawson Technical Consultants will perform are as follows :

- Perform a system review to verify requirements for Lawson products are met prior to upgrade
- Participate in the Technology Planning Session
- Work with Lawson Clients to determine the preferred Upgrade path (Upgrade While Active or traditional)
- Assist Lawson Clients in verifying that all non-Lawson products are at compatible release levels for the upgraded Environment
- Assist Lawson Clients in preparing their system with the optimum Lawson release levels necessary for an Upgrade
- Assist Lawson Clients with executing the Environment Upgrade from 7.3 to 8.0.2
- Assist Lawson Clients with the installation of the v8.0.3 Application product line
- Assist Lawson Clients with executing the test and production application data upgrades
- Work in conjunction with the Lawson Clients to ensure that technical resources understand the goals, scope and timeline of the Upgrade project
- Assist and train the Lawson Client's Lawson Administrator/DBA to be self-sufficient in setting up additional product lines