

## Upgrading Your WMS Software

### What should you know before you start?

The ultimate goal of an upgrade should be to add new functionality that will enhance your operation and lower costs, while staying current with new technologies. But before you begin the process, it is important to make sure that your whole team has a desire to upgrade your WMS functionality. The process begins with finding a strong project manager. Follow that with a plan for a long period of user acceptance testing and, finally, budget extra dollars for the possibility of new modifications.

The first step toward a successful WMS upgrade begins with a strong project manager. That choice should be seriously considered over price, projected timeline and promises made by the sales team. It's the project manager's job to be the good guy and the bad guy, the punching bag and the cheerleader – whatever it takes to keep your team moving forward and to keep all of the teams communicating. This, in turn, will give you an upgrade project that is on time and on budget.

Besides timeline and budgetary success, your project manager should help you lay out a clear scope of work, and be able to deliver that scope. Defining the scope for an upgrade can be even more challenging than an initial implementation. Where do you draw the line? How many new functions should you implement with the upgrade? What options are good for the operation, and what is just software "hype."

With today's more advanced systems, the sky's the limit and your users are much more educated, so they have even bigger and better ideas. It is critical when you upgrade to limit the changes you make in your system, at least for the initial go-live. It will be the project manager's job to help you navigate these waters.

#### Beginning the Process

For example, when defining the scope of the project you may want to conduct a warehouse assessment before a timeline or budget is even created. This assessment will explore current functionality and provide the opportunity to get users' input on their desires for the upgrade. It will also provide specific changes you should tackle during the upgrade. From there you can determine which changes would provide the largest operational savings, and split them into categories or phases in order to assure implementation success.



When you upgrade software, the warehouse is already in full operation and you cannot afford any kind of “burn-in” period like you have with most new implementations.

### Take Time for Acceptance Testing

Each implementation step is just as important during an upgrade as it was during the initial implementation, but one step – user acceptance testing – is even more critical than before. With most new implementations, the users have little or no specific expectations. They are coming from a different system or no system, and they don’t know how the new WMS is going to meet their needs. Therefore, they probably follow the scripts verbatim and think inside the box.

Making upgrades is different because everybody has set expectations. The operational team knows exactly how the RF screens should operate, how the labels and documents should print and which inquiries and reports are pertinent to their daily work. The customer service team knows exactly which screens they will use to communicate with the customers. IT knows how to support that version.

Talk about expectations! With most software, not only have the vendors added functionality, they have also deleted functionality or replaced

it with new and better code. So, sometimes, not by choice, the system will operate differently for your users. Therefore, the challenge is to make sure that everyone’s needs are still being met by the upgraded software.

As diligent as your consultant may be in trying to fully disclose all of the software changes to your team, it is difficult for a consultant to know if your operations will be negatively impacted by the incremental changes to base and they may not disclose every last detail. Changes like this get uncovered, in user acceptance testing, so it is critical that you save many weeks for user acceptance testing.

For example, ask for a handful of representatives from every user team to put their hands on the system in the test environment and perform their daily work. This not only serves as training for the users, but also flushes out the smallest issues and brings the system to a very stable point. This will lead to less onsite consultant time after go-live and decrease the number of open issues.

If you are in IT and you are considering doing an upgrade, it is vital to get complete buy-in from the operational team before initiating the project, because it will ultimately be their team that will determine the outcome of the upgrade. Also plan ahead for user acceptance testing, and choose a slow season, if possible.

Finally, many companies that are considering an upgrade today have probably had their current system for four or more years. Four years is a long time in the world of WMS, and functionality is less limited today. For this reason, you probably have made many modifications to your system and you will need a good programming staff to help migrate the code. It will be to your advantage to hire a consulting firm with programmers on-staff who have done upgrades and worked extensively with the WMS version you are upgrading to. This way, they are familiar with the code merger that will take place.

### Budgeting for Now – And the Future

It is important that you not only budget dollars to migrate your current code, but you should also budget dollars for unexpected new modifications. You may think upgrading will bring you closer to base, but this may not be the case. If your vendor consolidated all of its inquiry screens into a single inquiry screen, that sounds good to you, especially because it is base. You view the new screen during the conference room pilot and are happy with it. However, during user acceptance testing, you find out that when your vendor merged the screens, it moved one data field to the very last page of the inquiry and it takes your

users six key strokes to get there, when it used to take one.

Your users have high expectations and are not willing to accept this change, which is perceived as a detriment to the operation. So, during user acceptance testing, the programmer will do an emergency modification and change the screens for the user. As previously indicated, the users are much “squeakier” the second time around, and will not stand for any steps backward.

Also, it is important to realize that staying with base is a good concept for us technology folks, but it is just not a reality for the operations that we support. Most operations have a certain way they do business, where it is more cost justifiable to implement a modification than it is to go with base. So if you do decide to upgrade, make sure you select a consultant team that is empathetic to the ways you do business and is devoted to discussing the

impact of certain modifications and/or base functionality on your operations, early on in the design phase. Base code is not always your friend and getting rid of custom code should not be the driving force behind upgrading.

As mentioned earlier, the ultimate goal of an upgrade should be to add new functionality that will enhance your operation and lower costs, while staying current with new technologies.

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