

# Upgrading CHAMPS - Proven Methodology

A review of how the Upgrade process works

By: Nigel Pilsbury

INNOVATIONS

# Upgrading CHAMPS



- 1. How much does it cost?**
- 2. How long does it take?**
- 3. When can we do the upgrade?**
- 4. How long will CHAMPS be down?**
- 5. Will it make all my dreams come true?**

# Upgrading CHAMPS



1 to  $\infty$  weeks

Requirements

Software Migration

Installation and Review

Training

Go-Live



Requirements SOW

- 1. Requested changes**
- 2. New feature requests & Interfaces**
- 3. Data Loaders & Cleanup**
- 4. Goals and reasons for upgrading**
- 5. Calendar and Budget constraints**

# Upgrading CHAMPS



1 to 6+ weeks

Software  
Migration

Installation  
and Review

Training

Go-Live

- 1. Review and document all custom objects**
- 2. Merge custom and new version objects**
- 3. Write client-specific SQL alter scripts**



Upgrade Document

# Upgrading CHAMPS



1 week

Software Migration

Installation and Review

Training

Go-Live



New Software



Upgrade Document

- 1. Onsite Install**
- 2. Execution of SQL scripts**
- 3. Perform Upgrade Utilities**
- 4. Review new features and Change Logs**
- 5. Configure application features**
- 6. Document the configuration**

# Upgrading CHAMPS



1 - 2 weeks

Software Migration

Installation and Review

Training

Go-Live



User Manuals



Admin Roadmap



Application FAQs

- 1. New features training**
- 2. Admin and Application training**
- 3. Testing & Corrections**

# Upgrading CHAMPS



1 week

Software Migration

Installation and Review

Training

Go-Live



Onsite Support



Upgrade Finished

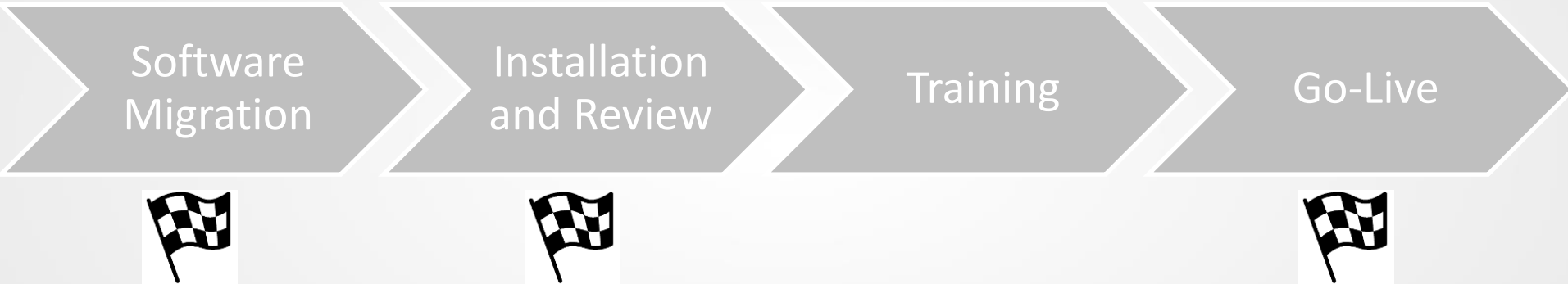


Users on the latest version

- 1. Onsite Install**
- 2. Execution of SQL scripts**
- 3. Perform Upgrade Utilities**
- 4. Issue Resolution**

# Upgrading CHAMPS

From just a Technical perspective... why does this process work?



**We Performed the Upgrade 3 Times !**

**We know exactly what to do during the Upgrade process.**

**We know exactly how long it will take.**



# Upgrading CHAMPS



On-going



CHAMPS Support

- 1. Requested changes**
- 2. Bug Fixes**
- 3. Email, Phone, and Zendesk**
- 4. GotoMeeting sessions**
- 5. Additional remote training**
- 6. User Group**

# Upgrading CHAMPS

Support

**The End**

# Upgrading CHAMPS

This specification outlines the software migration needed to upgrade a customer from their current release to an identified CHAMPS Baseline release.

Current Client Release:           Version 13           Release 02           Build 1331-I2

Target Baseline Release:        Version 14           Release 02           **Build 1415** or Higher

Current Client Database & Version:   MS SQL 2012

Custom Libraries:                F:\Client\_Projects\KFTL\PB12\_source\kftl\_custom\_v13  
F:\Client\_Projects\KFTL\PB12\_source\kftl\_V13\_upgrade\_utils  
F:\Client\_Projects\KFTL\PB12\_source\custom\_paj\_v13  
F:\Client\_Projects\KFTL\PB12\_Source\v13\_physical\_invn

Date Migration Performed:        7/29/19

Migration Performed By:          Barbara Baer

# Upgrading CHAMPS

## **WO Print Layout**

The completion section of the WO/Step Print Layout includes an area for Sign-off signatures and declared Downtime amounts.

## **REQ/PO Print Layout**

The REQ and PO Print Layout includes a Total Tax Amount.

The REQ Print Layout includes an Approved By column indicating the first approver.

PO Print includes Vendor Part No and Buyer's Signature bitmap.

## **Computed REQ/PO Tax Amounts** (Purchase Order Tax.doc)

The REQ and PO windows compute Tax Amount based on Taxable Locations, Taxable Items, and Tax Code Jurisdictions.

## **Quote/REQ/PO Processing** (RFQ Approval.doc)

The flow between REQs, Quotes, and POs is custom to PAJ.

PO Landed Cost, Multiple Maintenance Location exist within the baseline source code and do not impact the upgrade process.

The Equipment Meter Usage Tracking datawindow was removed from the application.

An interface of Inventory Movement and Receiving records to Oracle Financials.

# Upgrading CHAMPS

## Specific Problems Mentioned By The Client

KFTL wanted to Email signed POs and have PO Category Terms & Conditions attached to Email.

Recommended upgrading to B1414 to include simplified User Intray Alerts and Sum() based Alerts.

**NOTE:** KFTL does not allow use of USB drives and very few DVD readers are available. The final software deliverable to be installed Oct 10 must be provided via FTP.

### Issues

1. Want the higher level Routeslip details to be deleted after APPV item is signed by User with sufficient Spending Limits. Provided under B1415.

# Upgrading CHAMPS

## Promotion Requirements

Identify any changes to the Source Code. Identify source code that was discarded after review.

Objects upgraded from kftl\_custom\_v13 to kftl\_custom\_v14 – All objects in this pbl are to support the Champs to Oracle Financials Interface

<u>Orig Pbl</u>	<u>Object Name</u>	<u>Summary of Custom Object</u>
N/A	<u>D_cc_invm_staging</u>	Custom <u>datawindow</u> to display records in the staging table
<u>lc</u>	<u>D_invnlife</u>	Custom <u>datawindow</u> added the Layer and PO columns
<u>lc</u>	<u>D_invnlife_api</u>	Custom <u>datawindow</u> added the Layer and PO columns
N/A	<u>D_invmymdet</u>	Custom <u>datawindow</u> to support the Champs to Oracle Financials Interface
N/A	<u>R_cc_fifovalue</u>	Custom <u>datawindow</u> to support the Champs to Oracle Financials Interface
N/A	<u>R_cc_invmmove_export</u>	Custom <u>datawindow</u> to support the Champs to Oracle Financials Interface
N/A	<u>R_invmymdet</u>	Custom <u>datawindow</u> to support the Champs to Oracle Financials Interface
N/A	<u>Str_invmmove_det</u>	Custom <u>datawindow</u> to support the Champs to Oracle Financials Interface
<u>lc</u>	<u>U_api_inventory</u>	<p>Custom user object modified the <u>uf_lifofifo_processing</u> event and added the <u>uf_mvlfifofifo_processing</u> event to support the Champs to Oracle Financials Interface.</p> <p>KFTL other customizations are as follows:  <u>Uf_inventory_core</u> – KFTL adds <u>as_bin_list[]</u> to movement processing call  <u>Uf_lifofifo_adjustment</u> – KFTL adds <u>as_bin_list[]</u> to movement processing call  <u>Uf_movement_processing</u> – KFTL adds code to format datetime, Adds Bin to movement record insertion  <u>Uf_multiple_issue</u> – KFTL adds <u>as_bin_list[]</u> to movement processing call  <u>Uf_recalc_invmmove</u> – current baseline loads debit/credit data.                      Will need modification to call <u>uf_movement_processing</u> with <u>as_bin_list</u>  <u>Uf_receive_delta</u> – KFTL adds <u>as_bin_list[]</u> to movement processing call</p>
N/A	<u>W_cc_fifovalue</u>	Custom window to support the Champs to Oracle Financials Interface
N/A	<u>W_cc_invm_export</u>	Custom window to support the Champs to Oracle Financials Interface
N/A	<u>W_cc_invm_staging</u>	Custom window to support the Champs to Oracle Financials Interface
N/A	<u>W_cc_update_info</u>	Custom window to support the Champs to Oracle Financials Interface
N/A	<u>W_issue</u>	Custom window modification is to <u>wf_issue_item</u> - KFTL adds <u>as_bin_list[]</u> to movement processing calls (3)
<u>lc</u>	<u>W_locxfr</u>	Custom window modification is to <u>Ue_update</u> - KFTL adds <u>ls_bin_list[]</u> to movement processing calls (2).



# Upgrading CHAMPS

## Database Alters/Upgrade Utilities Required

This upgrade requires the following Database Alters and Upgrade Utilities to be performed by the developer when the software is being migrated and the client DBA/Administrator when the new release is delivered.

**Note – Any warning messages, such as changing the name of an object could break a script can be ignored.**

Database Alter Name	Expected Results
<a href="#">B1332_alter_db.sql</a>	No errors should be returned.
<a href="#">B1340_alter_db.sql</a>	No errors should be returned.
<a href="#">B1347_alter_db.sql</a>	Part of this baseline alter adds the Fix Inventory Bin/Serial Counts navigation and view. Since KFTL received this functionality prior to it being added to the baseline this was removed from the alter. The navigation for this window has been moved from the CMMS main menu in the KFTL database to the Inventory Navigation. Padlock should be applied to this navigation.
<a href="#">B1353_alter_db.sql</a>	No errors should be returned.
<a href="#">B1354_alter_db.sql</a>	No errors should be returned.
<a href="#">B1400_alter_db.sql</a>	No errors should be returned.
<a href="#">B1401_alter_db.sql</a>	No errors should be returned.

# Upgrading CHAMPS


Some of these changes are associated with new Setup required. The following is a list of those requiring Setup:

A new application option of Approvals - EQUIP has been added and set to 'N' to mimic previous functionality. If you would like to take advantage of this new functionality this can be set to 'Y' on the Applications Options|Admin Features window. **No**

A new application option of WO/WR on Unapproved Equipment has been added and set to 'Y' to mimic previous functionality. If you would like to take advantage of this new functionality this can be set to 'N' on the Applications Options|Admin window. **Yes**

A new application option of WO Print All Attachments has been added and set to 'Y'. This will automatically check the Print All Attachments checkbox when printing Work Orders. If you would prefer users to select specific attachments to print change this to 'N'. **No**

A new application option of Verify Ver# Installed(Y/N) has been added and set to 'N'. If you would like to take advantage of this new functionality this can be setup on the Applications Options|Admin window. **No (If yes, need paste Help|Account Version info)**

 A new application option of Misc SKUs on MRs (Y/N) has been added and set to 'N'. If you would like to take advantage of this new functionality this can be setup on the Applications Options|IC window. **No**