UNIT4

In Business for You

Success Catalog

Cloud Migration for ERP

Cloud Migration Services

Success Product	Description	Customer Outcome
Cloud Migration for ERP – Standard Migration Service	Migrate your ERP solution from on premises to SaaS.	Your "cloud ready" on premises solution has been moved to Unit4 SaaS.
Cloud Migration for ERP – Integrations Analysis Service	Review of up to 10 integrations in your existing ERP solution and provide our best practice approach to migration	10 integrations have been reviewed to provide you with a clear approach for your migration to Unit4 SaaS
Cloud Migration for ERP – Integrations Consultancy Service	Update of the integrations outlined in our review service using an approach defined for you	In scope integrations have been migrated to Unit4 SaaS including knowledge transfer to enable you to continue your expansion
Cloud Migration for ERP – AG16 Functional Analysis Service	Review of up to 10 AG16s in your existing ERP solution and provide our best practice approach to migration	10 AG16s have been reviewed to provide you with a clear approach for your migration to Unit4 SaaS
Cloud Migration for ERP – AG16 Rewrite Service	Update AG16s outlined in our review service using an approach defined for you	AG16s are migrated to the Unit4 Cloud including knowledge transfer to enable you to continue your expansion
Cloud Migration for ERP – SQL Functional Analysis Service	Review of up to 10 SQL items, including triggers, functions and stored procedure, in your existing ERP solution and provide our best practice approach to migration.	The SQL items have been reviewed, and you have a clear approach for your migration to Unit4 SaaS
Cloud Migration for ERP – SQL Rewrite Service	Update the SQL items outlined in our review using an approach defined for you	The SQL items are migrated to Unit4 SaaS including knowledge transfer to enable you to continue your expansion
Cloud Migration for ERP – ACT Functional Analysis Service	Review of up to 4 ACT Customisations in your existing ERP solution and provide our best practice approach to migration	The ACTs are reviewed, and you have a clear approach for your migration to Unit4 SaaS
Cloud Migration for ERP – ACT Rewrite Service	Update the ACT Customisations outlined in our review service using an approach defined for you	The ACTs are now migrated to Unit4 SaaS including knowledge transfer to enable you to continue your expansion

UNIT4

Success Product	Description	Customer Outcome
Cloud Migration for ERP – Document Archive Conversion Service	To assist in moving your existing document archive into the ERP database	Documents are now migrated to Unit4 SaaS and available in a single source for ERP.
Cloud Migration for ERP – M5/M6 On-Premise to ERP Cloud Release	Upgrade your existing Unit4 ERP5 or ERP6 solution to Unit4 ERP CR	Your "cloud ready" on premises solution has been moved to Unit4 SaaS.
Cloud Migration for ERP – Unit4 IDS Service	Provision of assistance in the installation and configuration of Unit4 Identity Services (IDS) for all Customer's Unit4 applications	Access to all Unit4 applications is available using single sign-on

Notice/Disclaimer

Each packaged service (Service) set out in this catalogue has a detailed Service Description that is provided to you in advance of purchasing the Service, which sets out what Unit4 will deliver, what is expected of you and any assumptions or pre-requisites made in relation to the Service. You will be deemed to have accepted the terms of the Service at the point Unit4 commences delivery. These Services are pre-defined and cannot be adjusted. Unit4 shall not be obliged to deliver anything outside the defined scope or deliverables of the particular Service. In the event (i) Customer requires additional services beyond the defined scope, or (ii) services are required as a result of Customer's failure to fulfil its obligations, or (iii) the assumptions are incorrect or pre-requisites not fulfilled, Unit4 reserves the right to charge at its Prevailing Rates for any additional Services rendered.

UNIT4

Cloud Migration for ERP - Standard Migration Service

Service Overview

The Standard Migration Service provides Unit4's standardised cloud migration approach based on the cloud migration team methodologies, processes, and templates to those hosting Unit4 ERP on-premises or on third-party hosting infrastructure.

Scope of Service

Unit4 will perform the following:
- Run three workshops to
    - review functionality differences between versions.
    - review existing Customisations (as set out below).
    - review existing integrations (as set out below).
- Provision the update to ERP CR from ERP7 and complete the necessary configuration changes.
- As set out in the Cloud Migration Assessment.
    - Review and migrate up to five ACT Customisations.
    - review and migrate up to 50 AG16 Customisations.
    - review and migrate up to 20 integrations for compliancy in Unit4 SaaS
    - review of up to 10 SQL items, including triggers, functions and stored procedures, and provide our best practice approach to migration
    - migrate up to 500000 filesystem documents to the Unit4 SaaS.
- provide UAT support and knowledge transfer.
- provide Cutover support over a period of up to one week.

Training

As part of your ongoing enablement the following course is recommended to support your migration:

- How things work in the cloud

Pre-requisites, assumptions, and exclusions

This service assumes a maximum of four weeks UAT.

As with all migrations, preparation is a key factor and therefore to get yourself ready for success you need to ensure that:

- a recent Cloud Migration Assessment has been completed. If not, this is free of charge and can be requested here.
- Customer project team is staffed with suitably experienced roles, familiar with the Customer solution and Customer's business requirements.
- Remote access is available and will be provided (if requested).
- all interfaces and integrations are using technology compatible with Unit4 SaaS as described in Service Description and are managed by the customer.

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- Customer provides associated document or people that have detailed technical and functional knowledge on existing SQL in scope.
- SQL source code and document is made available for the workshop and review.
- Unit4 Identity Services have been configured (if applicable).

UNIT4

Cloud Migration for ERP – Integrations Analysis Review Service

Service Overview

The Integrations Analysis Review Service provides our standardised approach to assisting with the review of your existing integrations on Unit4 ERP in alignment with migrating to the Unit4 SaaS.

The service will clearly define, for up to ten integrations, the changes needed to ensure compliancy for migration to the Unit4 SaaS.

Scope of Service

Unit4 will perform the following:
- conduct one workshop to
  - Review up to 25 integrations identified by Customer
  - Provide guidance on the standard integration methods
  - Identify changes required to support migration of integrations
- prepare Integrations Analysis Document

Deliverables

The following deliverables are in scope for this service:

- Integrations Analysis Document

Pre-requisites, assumptions, and exclusions

As with all migrations, preparation is a key factor and therefore to get yourself ready for success you need to ensure that:

- a recent Cloud Migration Assessment has been completed. If not, this is free of charge and can be requested here.
- customer project team is staffed with experienced roles familiar with the Customer solution and business requirements.

UNIT4

Cloud Migration for ERP – Integrations Consultancy Service

Service Overview

The Integrations Consultancy Service provides leadership during the migration of integrations by assisting with the Unit4 solution deployment or configuration.

Scope of Service

Unit4 will perform the following:
- support customer with adopting the required changes identified in the Integrations Review Document in the Cloud Migration for ERP – Integrations Review Service
- provide support during customers testing of the integrations in scope as per the Cloud Migration for ERP – Integrations Review Service

Deliverables

The following deliverables are in scope for this service:

- Integration Configuration Document

Pre-requisites, assumptions, and exclusions

This service will consume 5 days across one consecutive month

As with all migrations, preparation is a key factor and therefore to get yourself ready for success you need to ensure that:

- Customer must have an Integration Review Document provided as part of the Cloud Migration for ERP - Standard Migration Service or Cloud Migration for ERP – Integrations Consultancy Service
- Customer project team is staffed with experienced roles familiar with the Customer solution and business requirements.
- Customer provides associated document or people that have detailed technical and functional knowledge on existing integrations in scope

UNIT4

Cloud Migration for ERP – AG16 Functional Analysis Service

Service Overview

The AG16 Functional Analysis Service provides our standard approach to understanding your existing AG16s and the steps needed to move to the Unit4 Cloud.

Scope of Service

Unit4 will perform the following:
- conduct one workshop to analyse up to 20 AG16s from the Cloud Migration Assessment
- prepare the AG16 Functional Analysis Document
- support the Customer code review submission for the in-scope AG16s
- provide code review of up to ten AG16s.

Deliverables

The following deliverables are in scope for this service:

- AG16 Functional Analysis Document

Pre-requisites, assumptions, and exclusions

As with all migrations, preparation is a key factor and therefore to get yourself ready for success you need to ensure that:

- a recent Cloud Migration Assessment has been completed. If not, this can be requested here.
- Customer project team is staffed with experienced roles familiar with the Customer solution and business requirements.
- Customer provides associated document or people that have detailed technical and functional knowledge on existing AG16s in scope.
- AG16 source code and document is made available for the workshop and review.

UNIT4

Cloud Migration for ERP – AG16 Rewrite Service

Service Overview

The AG16 Rewrite Service provides customer with support of rewriting up to ten AG16s defined as part of the AG16 Function Analysis service to be ready for the Unit4 SaaS.

Scope of Service

Unit4 will perform the following:

- support customer with adopting the required changes identified in the AG16 Functional Analysis Review Document from the Cloud Migration for ERP – AG16 Functional Analysis Service
- provide support during customers testing of the AG16s in scope from the Cloud Migration for ERP – AG16 Functional Analysis Service

Deliverables

The following deliverables are in scope for this service:

- AG16 Configuration Document

Pre-requisites, assumptions, and exclusions

This service will consume 10 days across one consecutive month

As with all migrations, preparation is a key factor and therefore to get yourself ready for success you need to ensure that:

- AG16 Functional Analysis Document is available from the Cloud Migration for ERP – AG16 Functional Analysis Service
- Customer project team is staffed with experienced roles familiar with the Customer solution and business requirements.
- Customer provides associated document or people that have detailed technical and functional knowledge on existing AG16s in scope.
- AG16 source code and document is made available for the workshop and review.

UNIT4

Cloud Migration for ERP – SQL Functional Analysis Service

Service Overview

The SQL Functional Analysis Service provides our standard approach to understanding your existing SQL and the steps needed to move to the Unit4 Cloud.

Scope of Service

Unit4 will perform the following:
- conduct a workshop to analyse up to ten SQL items from the Cloud Migration Assessment
- prepare the SQL Functional Analysis Document
- support the Customer code review submission for the in-scope SQL items.
- provide a code review of up to ten SQL items (triggers, procedures, statements).
- prepare the SQL Code Review Document

Deliverables

The following deliverables are in scope for this service:

- SQL Functional Analysis Document

Pre-requisites, assumptions and exclusions As with all migrations, preparation is a key factor and therefore to get yourself ready for success you need to ensure that:

- a recent Cloud Migration Assessment has been completed. If not, this can be requested here.
- Customer project team is staffed with experienced roles familiar with the Customer solution and business requirements.
- Customer provides associated document or people that have detailed technical and functional knowledge on existing SQL in scope.
- SQL source code and document is made available for the workshop and review.

UNIT4

Cloud Migration for ERP – SQL Rewrite Service

Service Overview

The SQL Rewrite Service provides customer with support of rewriting up to ten SQL items defined as part of the SQL Function Analysis service to be ready for the Unit4 Cloud.

Scope of Service

Unit4 will perform the following:

- support customer with adopting the required changes identified in the SQL Functional Analysis Review Document from the Cloud Migration for ERP – SQL Function Analysis Service .

- provide support during customers testing of the SQL in scope from the Cloud Migration for ERP – SQL Function Analysis Service

Deliverables

The following deliverables are in scope for this service:

- SQL Configuration Document

Pre-requisites, assumptions and exclusions

As with all migrations, preparation is a key factor and therefore to get yourself ready for success you need to ensure that:

- SQL Functional Analysis Document is available from the Cloud Migration for ERP – SQL Function Analysis Service
- Customer project team is staffed with experienced roles familiar with the Customer solution and business requirements.
- Customer provides associated document or people that have detailed technical and functional knowledge on existing SQL in scope.
- SQL source code and document are made available for the workshop and review.

UNIT4

Cloud Migration for ERP – ACT Functional Analysis Review Service

Service Overview

The ACT Functional Analysis Service provides our standard approach to understanding your existing ACTs and the steps needed to move to the Unit4 Cloud.

Scope of Service

Unit4 will perform the following:

- conduct one workshop to analyse up to five ACT from the Cloud Migration Assessment
- prepare the ACT Functional Analysis Document
- support the customers code review submission for the in-scope ACTs.
- provide a code review of up to four ACTs.

Deliverables

The following deliverables are in scope for this service:

- ACT Functional Analysis Document

Pre-requisites, assumptions, and exclusions

As with all migrations, preparation is a key factor and therefore to get yourself ready for success you need to ensure that:

- a recent Cloud Migration Assessment has been completed. If not, this can be requested here.
- Customer project team is staffed with experienced roles familiar with the Customer solution and business requirements.
- Customer provides associated document or people that have detailed technical and functional knowledge on existing ACTs in scope.
- ACT source code and document is made available for the workshop and review.

UNIT4

Cloud Migration for ERP – ACT Rewrite Service

Service Overview

The ACT Rewrite Service provides customer with support of rewriting up to 4 ACTs defined as part of the ACT Function Analysis service to be ready for the Unit4 Cloud.

Scope of Service

Unit4 will perform the following:

- support customer with adopting the required changes identified in the ACT Functional Analysis Review Document from the Cloud Migration for ERP – ACT Functional Analysis Review Service.

- provide support during customers testing of the ACTs in scope from the Cloud Migration for ERP – ACT Functional Analysis Review Service

Deliverables

The following deliverables are in scope for this service:

- ACT Configuration Document

Pre-requisites, assumptions, and exclusions

As with all migrations, preparation is a key factor and therefore to get yourself ready for success you need to ensure that:

- ACT Functional Analysis Document is available from the Cloud Migration for ERP – SQL Function Analysis Service
- Customer project team is staffed with experienced roles familiar with the Customer solution and business requirements.
- Customer provides associated document or people that have detailed technical and functional knowledge on existing ACTs in scope.
- ACT source code and document is made available for the workshop and review.

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Cloud Migration for ERP – Document Archive Conversion Service

Service Overview

The Document Archive Conversion Service provides our standard approach for converting your existing document archive into the Unit4 ERP database ensuring that your documents are accessible from a singular source for ERP requirements.

Scope of Service

Unit4 will perform the following:
- conduct one workshop to understand your existing document archive.
- migrate up to 1,000,000 documents to the database
- validate the completion of the document migration
- provide support of up to one day for customer UAT

Deliverables
- None

Pre-requisites, assumptions, and exclusions

As with all migrations, preparation is a key factor and therefore to get yourself ready for success you need to ensure that:

- the Cloud Migration for ERP - Standard Migration Service has been completed.
- Customer project team is staffed with experienced roles familiar with the Customer solution and business requirements.

UNIT4

Cloud Migration for ERP – M5/M6 On-Premise Migration to ERP Cloud Release Service

Service Overview

The M5/M6 On-Premise Migration to ERP Cloud Release Service provides our standardised approach to migrating you to Unit4 ERP Cloud Release by assisting you in upgrading your existing ERP M5 or M6 implementation.

Scope of Service

Unit4 will perform the following:

- restore customer database to the ERP Cloud
- upgrade from ERP M5 or M6 to the latest ERP release
- in line with Unit4 Cloud Service Description - Unit4 ERP 7 v.1.9 (EN) and the information from the Cloud Migration Assessment, apply:
  - ERP localisations as identified in the Cloud Migration Assessment
  - ERP Add-ons and Experience Packs
- prepare Onboarding Report Document

Deliverables

- Onboarding Report Document

Pre-requisites, assumptions, and exclusions

As with all migrations, preparation is a key factor and therefore to get yourself ready for success you need to ensure that:

- the Cloud Migration for ERP - Standard Migration Service is a pre-requisite for this service.
- Customer Unit4 ERP on-premise solution is currently on version M5 or M6
- Customer project team is staffed with experienced roles familiar with the Customer solution and business requirements.
- Customer ERP database and required files should be provided by customer via SFTP or Azure Storage

Cloud Migration for ERP – Unit4 IDS Service

Service Overview

The Unit4 IDS Service provides consultancy and support in the introduction of the Unit4 Identity Services so that customer can unify access and identity across applications within the Unit4 ecosystem using a single sign-on.

Scope of Service

Unit4 will perform the following:
- installation of Unit4 Identify Service (U4IDS)
- configuration of the U4IDS with Unit4 applications.
- prepare IDS Configuration Document.

Deliverables

- IDS Configuration Document

Pre-requisites, assumptions, and exclusions

Preparation is a key factor and therefore to get yourself ready for success the following:

- Customer is migrating to or already exists in the Unit4 Cloud
- Customer project team is staffed with experienced roles familiar with the Customer solution and business requirements.
- Customer must configure their internal Identity Provider (IdP)
- Customer must request U4IDS using a service request in Community4U

Customer will manage the user configuration in Unit4 ERP

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UNIT4