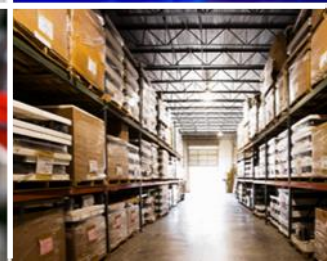


Options to Migrate Your ERP to the Cloud Now

October 6, 2022 2:00 PM EDT



Options to Migrate Your ERP to the Cloud Now

Today's Panel



Vice President – Business Solutions

Anita Younger



Sr. Director Program Management

Keith Randazzo

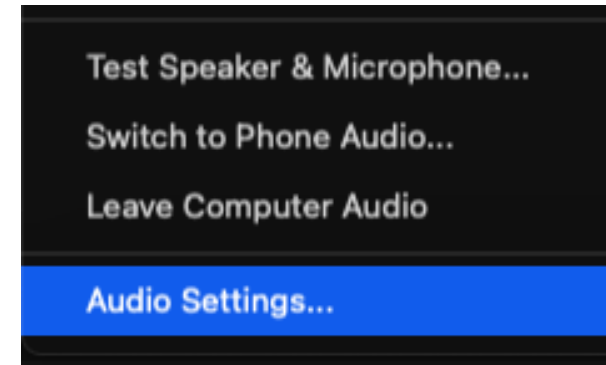
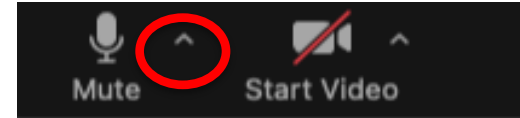


Sr. Director, Marketing

Barbara Ware

Zoom Event: How to Participate

- Join or Change Audio:
 - Click arrow next to Mute button
 - You have the options to set microphone and speakers, test them, adjust volume or switch to phone audio
 - Full audio settings allows you to and change other settings



Agenda

- About Strategic Information Group
- Why QAD Cloud Adaptive ERP
- Your Options for Migrating to the QAD Cloud

When Migrating to the QAD Cloud, You Have Options

- Database Conversion
 - Technical Upgrade, Phased Approach, Maximize New Functionality
- Realignment Upgrade
 - Start with a blank new database, and extract, cleanup and load your master data
- Lift and Shift to Cloud
 - Migrate your current version to the QAD Cloud

About Strategic

About us:

- **Established:** 1992
- **Employees:** 120+
- **Headquarters:** Rock Hill, SC (Charlotte, NC area)
- **Channel Areas:** North America, Ireland, UK, Sweden, Denmark
- **Locations:** USA (5), Canada, UK, Ireland, India, Thailand
- **Customers:** 1200+ Companies
 - 750+ full implementations
- **Products**
 - QAD Adaptive ERP
 - Quality Management Systems
 - ERP Integration Adaptors & Extensions
 - FDA Validation Toolkits/Protocols
- **Services**
 - Implementations
 - Integrations
 - Upgrades
 - Managed Services (QAD and EDI)



- QAD Help Desk (helpSERV)
- Staff Augmentation

Why Partner With Strategic

- Experience = Success = Confidence
- Hundreds of successful upgrades
 - From various eB2, Standard Edition (SE), and Enterprise Edition (EE) versions to the Adaptive ERP (AE)
- More AUX experience than any other QAD partner
 - Adaptive User eXperience (AUX) – browser-based User Interface or Web UI
 - Older customizations can often be replaced with AUX functionality. SIG has more AUX experience than any other partner of QAD
- Trusted Advisor to 100's of QAD Customers



Best Practices and Proven Upgrade Methodology



- For rapid adoption of AUX by the users
- On Realignment vs Database Conversion vs Lift-and-Shift
- Technical Upgrade or adding new functionality in phase 1 or phase 2 ?
- For migrating integrations or system enhancements
- Guidance on FDA Validation for an upgrade

Experience Yields Expertise! Moving ERP to the Cloud



Experience Yields Expertise! Upgrading Your ERP

Life Science



Life Science



Life Science



Industrial



High Tech



Food & Beverage



Consumer Products



Automotive



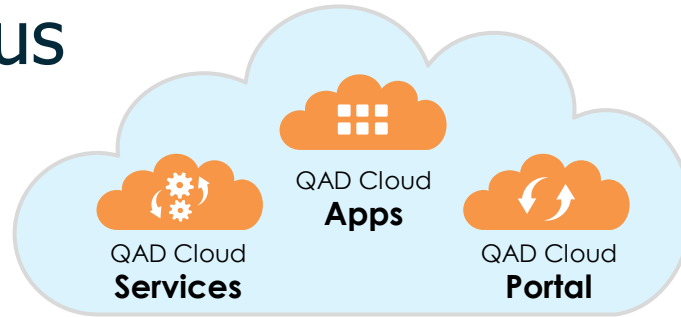
We certainly made the right choice to partner with Strategic, and really look forward to working with you on any future projects...

The consultants were Skilled, Professional, and Easy to deal with, just Absolutely Great!

*Wendy Holowchuk, ERP Project Manager
Elmira Pet Products
ERP Upgrade*

Why QAD Cloud

QAD Cloud Focus



We are leaders in the Cloud

delivering full-strength cloud ERP available globally



Global

40+ Countries



Users

43,000+



Support

24x7 & Monitoring



Secure

SSAE-18 (ISO-27001)



Available

> 99.5%



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QAD Cloud Benefits – Technical & Application



High Availability Architecture



Disaster Recovery



24/7 Cloud Monitoring



**Adaptive Enterprise
Platform, including AUX**



Embedded Analytics



QAD Cloud Bundle

QAD Cloud benefits - Technical

High Availability Architecture

- Dependable, Secure, Certified and Continuing Certifications
- Private Cloud Architecture

Disaster Recovery

- Whole server replication to separate facility
- Reduce risk of Data Loss Disasters
- Standard Disaster Recovery (RPO 1, RTO 8)

Cloud Services – 24/7 “follow the sun” shifts

- Service Management, Infrastructure Management (Data Center and OS Support), and
- Systems Management – DBA, App & System Admin, Monitoring & Tuning, DR

Committed to Ongoing Certification



ITSM 647145



IS 647144



STAR 653453



And Others



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Application Benefits Adaptive ERP (AE) with AUX

Adaptive ERP

- Only Available in the QAD Cloud
- AUX - Intuitive Interface
 - No more Next/Back
- HTML5 and mobile



Why Adaptive ERP with AUX



Action Centers

(Embedded Analytics)

60+ pre-configured Action Centers and
180+ KPI's

Insights (context relevant)



New Functionality only in AUX

(*just a few select examples)

Supplier and Item Certification

Purchase Order Approval

Copy a Sales Order

Alerts

Online Guide Me

Why Adaptive ERP with AUX



Additional Modules are Included

Enterprise Asset Management (EAM)
Trade Activity Management (TAM)
QAD Configurator (rules based)
AUX Fixed Assets



Everything new for Adaptive ERP

For the past 3 years and the QAD Roadmap moving forward is all centered around the Adaptive ERP

You have Options.....

Options for Migrating to the QAD Cloud

- Option 1: Lift & Shift to Cloud
- Option 2: Upgrade & Migrate to the Cloud
 - Data Migration
 - Conversion vs a Realignment
 - New Functionality Rollout for an Upgrade
 - Technical Only vs Phased Rollout vs Big Bang





Lift & Shift to the Cloud

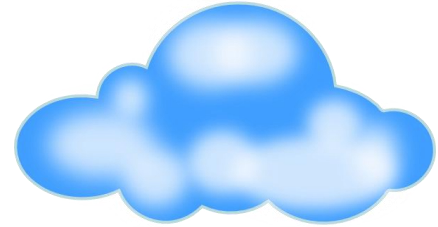
Lift & Shift

Advantages

Minimal impact to the organization, no change in software version or usage

The shortest timeline. Provides quick path to the QAD Cloud

Customers that have immediate needs for Disaster Recovery or Infrastructure Issues



Lift & Shift

Possible Disadvantages

Same version of the software

No new functionality, including AUX



2

Upgrade and Migrate to the Cloud

Data Migration Choices

Conversion – Convert the data using QAD supplied conversion scripts.

Realignment – Extract the data from the existing QAD database and reload to the new version using standard QAD & Progress tools.



Conversion

Advantages	Examples
All master data is converted to the new version	Items, Customers, Suppliers, etc
All historical transaction data is available in the new version	Inventory History, GL Transactions, Sales History, etc

Conversion

Possible Disadvantages	Examples
No opportunity to scrub master data	Items, Customers, Suppliers, etc
No opportunity to realign key setup decisions	Product Lines, Chart of Accounts, Customers, Key Numbering Conventions, etc
No opportunity to purge historical data	
Might be more complex and a longer timeline if converting from SE or eB2	

Realignment

Advantages	Examples
Opportunity to scrub master data before it is reloaded into the new database	Items, Customers, Suppliers, etc.
Opportunity to realign key data if the current structure does not work or will impede further growth	Chart of Accounts, Product Lines, Key Numbering Conventions like Customers, Sites, etc.

Realignment

Advantages	Examples
Leave behind potentially years of unnecessary data	Inventory Transactions, GL transactions, Invoice History
Might be simpler and a shorter timeline if converting from SE or eB2	

Realignment

Possible Disadvantages	Examples
<p>No historical data is converted ** ** SIG has a solution if this is a major obstacle</p>	<p>This can be a concern for many QA groups regarding Lot Traceability and Production records.</p>
<p>If the objective is to scrub the master data or realign key setup, this adds effort to your internal project team</p>	

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New Functionality: Technical Upgrade vs Phased Rollout vs Big Bang

Technical Upgrade vs Phased Rollout vs Big Bang

Regardless of the data conversion approach, another decision is.....

Do you want to take on the upgrade PLUS new functionality ?

OR

Would it be better to upgrade to the latest version and later rollout new functionality later ?



Options for New Functionality

- **Technical Upgrade** – NO new functionality is rolled out, upgrade to latest version and keep it the same as today. This is only an option if currently on EE.
- **Phased Rollout** – implement SOME functionality in the 1st phase. ID some quick WINS, like AUX, and rollout more functionality in future phases.
- **Big Bang** – implement all the functionality in one rollout.



Technical Upgrade vs Phased vs Big Bang

- Are there synergies that you can leverage?
- What is the amount of change being introduced to the organization at once?
- Are there some quick and easy WINS vs long term improvements?
- What is your timeline?
- How will it impact internal resources (project team)?



A Recap of Your Options.....

Option		Highlights
Upgrade & Migrate	Data Migration	Conversion or Realignment
	Functionality	Technical, Phased, or Big Bang Rollout

Option		Highlights
Lift & Shift		Shortest path to the Cloud
		No new functionality ☹️



Strategic has more **EXPERIENCE** and **SUCCESS** than any other QAD Services Provider, and we can guide you through the options best suited for your organization.



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Questions?



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