

## CASE STUDY

# ERP Upgrade Spanning Business Processes Across the Operations

## The Challenge.

When a large, independent E&P was faced with a major software upgrade that would span business processes across its operations, it reached out to Magnum Forge for help. We met the wide-ranging demands of project planning, including testing, training, and cutover activities related to the upgrade. Additionally, Magnum Forge ensured the completion of the rigorous audit documentation mandated by the company's internal auditor and its public-accounting firm. Magnum Forge's leadership allowed the company to focus on its core business during a period of economic challenges due to the plunging price of oil.

## The Opportunity.

Following a recent relocation of a company's headquarters from Texas to Oklahoma, this client was faced with a major software challenge. The version of its ERP software was no longer supported, and an upgrade was necessary to sustain the anticipated growth of the company and to avoid the cost of self-maintenance. Despite the relocation, none of the users in Texas chose to relocate to Oklahoma. Those in Oklahoma did not feel that they had received sufficient training on the full suite of business processes that needed to be addressed during an upgrade project, and they found attempting an upgrade alone uncomfortable. Magnum Forge was tasked with creating a project plan, scoping the business processes to be tested, creating step-by-step test scripts, and managing the upgrade—all alongside the client's personnel. In addition, the client saw the opportunity to use Magnum Forge to reinforce the users' proficiency with the ERP software, as part of the upgrade, and to identify areas where the client was not making full use of the ERP's functionality.

With more than twenty-five years of combined experience using Enertia software and having completed multiple installations of Enertia software and upgrades for upstream oil and gas companies, Magnum Forge was an obvious choice for this four-month undertaking.

## The Project.

Major software upgrades may significantly disrupt normal work activities because system users are asked to test the full functionality of the software before upgrading. To minimize the effort required by the client's personnel, Magnum Forge 1) used existing sets of business processes to quickly narrow the scope of the testing to the business processes and scenarios that the client actually performed on the software; 2) customized existing test scripts for the client's personnel to use to test and document test results; 3) tracked and documented the resolution of testing issues; 4) created and delivered training to end-users on the differences between the current and new Enertia version; 5) worked with the client to identify changes to business processes or use of the ERP to significantly improve the efficiency and accuracy of business processes run on the ERP; and 6) archived all project documentation for future audit purposes.

## The Outcome.

The project exceeded the client's expectations by meeting the upgrade date, providing rigorous documented testing, and coming in slightly under budget—even while tackling several process and functionality improvements that were not in the project's original scope. The client has asked Magnum Forge to continue providing its services to make additional use of the ERP capabilities, to achieve even greater efficiency.

By delivering the upgrade on time and within budget, Magnum Forge allowed the client to focus on running its business at a time when depressed oil prices made cost savings a key requirement. In addition, Magnum Forge's work helped this client use its ERP more efficiently, allowing it to get more out of its software investment with fewer staff hours each month.

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