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# WHEN SHOULD YOU UPGRADE YOUR SOFTWARE?

Most of you receive fairly regular offers to upgrade your software from the software manufacturers. **When should you actually consider upgrading your software?** You should be aware that I derive a small portion of my income from selling software upgrades, I'm going to attempt to give you my most impartial and unbiased view on this issue.

First, let's tackle the issue of **WHY** upgrade and then the finer points and nuances of **WHEN** to upgrade. Many of us just don't want to be bothered with installing new software, especially when the old software is working just fine. Why rock the boat? I will never recommend an upgrade to someone just because it is "new" and has a lot more "bells and whistles". However there are some very valid and serious considerations that should be reviewed in every firm to prevent a lot of heartache, lost time and maybe lost data. You should make this review a part of your annual maintenance. Here are the **WHY** issues:

## SOFTWARE OBSOLESCENCE:

Every software manufacturer depends on revenues from upgrades to continue to fund research and development. All products must undergo continuous development, even if no new features are added. Software changes must be made to ensure compatibility with the latest operating systems and hardware. Almost every manufacturer will support the current software version plus the previous 2 versions. Software companies are unable to maintain a technical support staff that is well versed on old software versions (some even have difficulty with the newer versions...another story). [Compu-Aid](#) is generally able to assist with many, but not all, issues that may arise when using obsolete software. Here are some questions to ask yourself:

- **How old is my software?** If you have a supported software version, then there is probably no pressing need to upgrade.
- **How long can I keep my old, unsupported version?** If you can be sure that nothing will change in your hardware, network or operating system, you can continue to use the old software, however, be aware that changes to hardware, networks and operating systems can happen suddenly and without much warning. If a system fails, it will be replaced with the newest hardware and operating systems. It is not always possible to buy new equipment with obsolete operating systems
- **What kind of changes would force me to upgrade?**
  - If the **hard drive storing your software crashes**, it is not enough to have a back up of the data files. Software programs must be reinstalled. You must have all configuration codes, serial numbers, registration numbers, add-ons, and service releases to re-install on a new hard drive. This is the number one problem we see with older software. It can cause a lot of (expensive) grief.
  - If you **replace a workstation** with a new one running Windows 7 or the latest operating system. It is almost guaranteed that the older software will not run on this new workstation.
  - You want to **add a new license**. The software manufacturer won't sell one for old software.
  - Your client now wants you to do **electronic billing**; you want to **interface to a smart phone**, etc. (**anything new** that you want to add). Again, these add-on options won't be available for old software.

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- **Do you know what new features have been added to the new versions?** You should find out if there are new software features that would enhance your operations and make it more efficient before you decide against an upgrade.
- **You are getting a lot of errors in the software. Should you upgrade?** Upgrades will not fix errors. Software errors must be addressed before installing upgrades and doing data conversions

**Once software becomes obsolete, we consider software upgrades as a part of preventive maintenance.** I can't think of any cost-effective reasons for continuing to use obsolete software, unless you are a very small firm and are planning to retire within the year (and want to keep your fingers crossed that nothing goes wrong in the meantime).

## WHEN TO UPGRADE?

Once again, this should be a part of your annual review and planning process. Here are some planning and preparation tips:

- Complete all your major billing for the period.
- Have current reports available to use as a comparison with the new, converted data.
- All personnel should make whatever arrangements necessary to allow them to work while the system is down for at least one day (It can be much less, but this is what you should prepare for).
- Plan your upgrade and data conversion for the "slow" time of year (Christmas holidays, Thanksgiving, etc.) in order to have the least impact.
- Make sure you have more than one good back up of your software and data files. You should have your network technician verify the back up before upgrading.
- Don't wait until it is a crisis. Review your software annually. Make plans for an appropriate time for installation so that the implementation can be conducted in an orderly fashion.
- Don't wait until your software is sending you multiple error messages. An upgrade will not fix data errors. Have the data errors repaired before the upgrade installation.
- If you are planning to add new workstations or upgrade your server and network system, this can be a good time to upgrade software, especially if the operating system will change to Windows 7.

And now, last, but not least:

## PURCHASING TIPS:

Many software manufacturers maintain the same price for upgrades all year long. However, even these companies will occasionally run a "special". If you have it your schedule to upgrade software sometime during the year, it might be a good time to purchase and take advantage of the pricing. Software can be installed anytime. Some software companies run monthly software upgrade specials. The very best time to purchase an upgrade is just before a new product is released, if the software company is offering "pre-release pricing." You will save a considerable amount of money. Keep your eyes open for "pre-release" or "new release" specials. These will usually start appearing sometime in the late spring. You can purchase to take advantage of the lower pricing and then hold on to it until you are ready to schedule an upgrade installation.