

PLATNED / IFS UPGRADE EXPERTISE

Beyond the upgrade

How to make IFS Cloud the foundation for modern operations and industrial AI

For IT leaders, transformation teams and service and business stakeholders assessing legacy IFS Applications, IFS FSM or earlier IFS Cloud releases.

Executive summary

Moving from legacy IFS software is more than a release change. IFS Cloud offers a modern foundation for connected enterprise processes, operational data and future industrial AI. For organisations using IFS Applications 9 or 10, legacy IFS FSM or earlier IFS Cloud releases, the challenge is to protect operations while assessing the platform, service model and capabilities needed for the next stage of growth.

This guide covers readiness, migration choices, testing, support planning and long-term value. It also explores how IFS Intelligence and Platned Axiom can contribute to an AI roadmap once the right data, controls and processes are in place.

1. Reframe the business case

“We need a supported release” is a reason to investigate change, but not the whole business case. Leaders should also consider fragmented data, costly customisations, disconnected service workflows, manual testing and the opportunity to build the operational foundation for AI. IFS Cloud can create a stronger base for innovation, but AI value depends on data quality, process design, governance and adoption.

A useful business case should distinguish necessary platform work from elective transformation. Not every process needs to be redesigned in the same programme. Prioritise improvements by business benefit, readiness and delivery risk, and define what success will look like in measurable terms.



Operational measures. Examples include time to complete critical workflows, manual hand-offs, data reconciliation effort and incident volumes.



Adoption measures. Examples include user readiness, training completion and uptake of redesigned processes.



Technical measures. Examples include test coverage, integration success, migrated data accuracy and post-go-live stability.

2. Understand the upgrade you are planning

An IFS Applications to IFS Cloud migration can involve major changes in architecture, processes, integrations and user experience. A legacy IFS FSM to IFS Cloud transition calls for a service-specific assessment of scheduling, dispatch, mobile work, customer commitments and integrations. For some FSM customers, an integrated IFS Cloud service model may be attractive; others may prefer a best-of-breed service platform. This should be a business-led choice, not an assumed upgrade path.

For IFS Applications 9 or 10, assess which legacy behaviours remain essential and which standard IFS Cloud capabilities could replace them. For FSM, map service requirements, existing operational strengths, integration boundaries and the total impact of changing platforms. Existing IFS Cloud customers should focus on update readiness, regression testing and adoption of relevant new capabilities.

Read more: [Platned guide to upgrading to IFS Cloud](#)

IFS Cloud as the foundation for AI

Moving to IFS Cloud can establish a more connected foundation for IFS Intelligence, which brings AI into operational data and workflows. Its Industrial AI Harness provides governance through existing permissions, policies and approvals, helping digital workers operate within defined business controls. AI readiness should therefore be planned alongside data ownership, integrations, process design and human oversight.

Platned Axiom is designed to complement IFS Intelligence, extending intelligent automation into practical business workflows. Rather than treating AI as a separate add-on, organisations can assess opportunities for governed actions, proactive monitoring and better decisions as part of their post-migration roadmap. Specific use cases and integration scope should be validated during discovery.

3. Five upgrade challenges that deserve early attention



4. A structured route to IFS Cloud

A credible IFS upgrade methodology combines governance with practical decision points. Platned Pathway is Platned's staged project delivery approach for IFS implementations, upgrades and enhancements. The exact work packages will differ by organisation, but five stages provide a helpful planning framework.

- ▶ **Assess.** Agree objectives and success criteria; baseline current processes, extensions, environments, interfaces and data; document risks and assumptions.
- ▶ **Design.** Select target ERP and service processes; review standard IFS Cloud capabilities, alternative service architectures where relevant, AI readiness and integration needs; confirm budget and cutover approach.
- ▶ **Build and migrate.** Configure the target solution; prepare data mapping and cleansing; rebuild or replace required integrations and reports; conduct migration rehearsals.
- ▶ **Validate and prepare.** Run functional, integration, security, performance and user acceptance tests as appropriate; train users; rehearse cutover and recovery.
- ▶ **Deploy and improve.** Execute go-live controls, monitor incidents, support users through hypercare and develop a post-upgrade optimisation roadmap.

Delivery methodology: Platned Pathway.

5. Test the business, not only the software

Testing can be one of the largest demands on an IFS upgrade team. When test cases are held in spreadsheets, depend on individual knowledge or require repeated manual execution, coverage can be inconsistent and expensive to sustain.

Platned Mahara is designed for IFS Cloud testing and enables organisations to automate repeatable scenarios. This can make regression testing more manageable during an upgrade and during later updates. It does not replace business ownership of acceptance criteria or the need to investigate unexpected results.

- ▶ **Prioritise by consequence.** Identify which process failures would stop operations, delay billing, compromise safety or affect regulatory obligations.
- ▶ **Test complete journeys.** Include master data, approvals, interfaces, reporting outputs and roles, not just individual screens.
- ▶ **Make testing repeatable.** Retain test data, expected outcomes and clear evidence so later changes can be validated consistently.

Explore automated regression testing: [Platned Mahara](#)

6. Plan data, reporting and integrations together

Migration succeeds when business owners can trust the information they see in the new environment. Start with data profiling and ownership, then agree which records are needed, how they will be transformed and how completeness will be reconciled. Test reports against agreed definitions, particularly where legacy calculations and custom outputs are changing.

Interfaces should be catalogued with their purpose, source, destination, frequency, error handling and responsible owner. Evaluate whether they should be rebuilt, simplified, replaced or retired. Testing should include failure and recovery scenarios as well as successful transactions.

7. Make people readiness a delivery milestone

A technically sound solution can still underperform if people do not understand new processes. Engage operational leads, finance teams, IT and end users early enough to shape practical decisions. Build training around real job tasks rather than generic feature tours, and establish a support model for the first weeks after deployment.

Cutover planning should include decision authority, data freezes where required, communications, a rehearsed schedule and agreed go/no-go criteria. Where disruption would have significant consequences, document contingency and recovery arrangements.

8. Build a plan for the day after go-live

The value of moving to IFS Cloud comes from sustained adoption and measurable improvements. Once operations are stable, establish a roadmap for testing, integrations, new capabilities and AI use cases. Prioritise applications of IFS Intelligence and complementary Platned Axiom capabilities where trusted data, clearly governed actions and operational value come together.

Platned Gateway provides a route to Platned expertise across legacy IFS applications, IFS Cloud, support, consulting, updates and upgrades. This enables organisations to connect post-go-live support with longer-term improvement rather than treating the upgrade as the end of the relationship.

Ongoing support and expertise: [Platned Gateway](#).

9. What to ask a potential IFS upgrade partner

Legacy and current-platform knowledge. Can the partner explain the differences between your current IFS environment and your target IFS Cloud solution?

Industry understanding. Can the team discuss the workflows and regulatory or operational constraints that matter in your sector?

Delivery transparency. How will scope, assumptions, risks, milestones and decisions be managed?

Validation capability. How will end-to-end testing be designed, automated where sensible and evidenced?

Long-term continuity. Who will support the solution and help adopt new functionality after go-live?

10. Why Platned

Platned brings together IFS functional and technical services with industry expertise in manufacturing, construction and engineering, service, and energy, utilities and resources. As an IFS Specialized Partner, Platned supports customers through IFS upgrades, migration, implementation, testing, user readiness and ongoing improvement.

Platned Pathway provides delivery structure and governance; Platned Mahara supports repeatable IFS Cloud testing; Platned Gateway provides access to specialist ongoing support; and Platned Axiom complements IFS Intelligence as organisations explore governed enterprise AI. Together these capabilities support purposeful change rather than carrying legacy complexity into a new platform.



An IFS upgrade readiness checklist

01	Have we agreed business outcomes beyond moving to a newer release?
02	Do we have an inventory of customisations, reports and integrations?
03	Are process owners accountable for future-state design and acceptance?
04	Do we understand the quality, volume and ownership of data?
05	Have we defined risk-based end-to-end testing and evidence requirements?
06	Are user communications, training, cutover and hypercare included?
07	Do we have a practical post-go-live optimisation plan?

Start with a conversation

Whether you are assessing IFS Applications 9 or 10, considering a move from legacy FSM to IFS Cloud, or planning the next stage of your IFS Cloud journey, Platned can help clarify your options, delivery risks, AI readiness and route to value.

Talk to Platned: [IFS Cloud upgrade services](#)

Additional resources: [IFS services](#) | [IFS Cloud solutions](#) | [Choosing an IFS upgrade partner](#)

Nota bene | IFS support planning: IFS Applications 9 is beyond extended support. For IFS Applications 10, extended support is scheduled to end on 27 March 2028, subject to eligibility and contract terms. IFS FSM 6 extended support is available until 31 January 2029. These are support milestones, not universal mandatory IFS Cloud migration deadlines. Confirm your position with IFS. Sources: IFS Global Support Policy and IFS Extended Support Terms (ifs.com).

