



Upgrading Your PeopleSoft Applications

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Agenda

- ◆ Overview
- ◆ Upgrade Options
- ◆ Upgrade Methodology
- ◆ Upgrade Steps
- ◆ Case Studies
- ◆ Questions / Wrap-up

JGI Overview

Oracle Accelerate

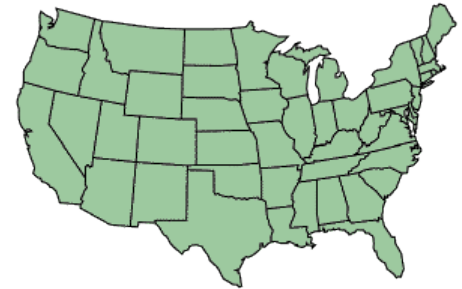
ORACLE CERTIFIED PARTNER

Over 30 years helping enterprises implement, improve and integrate their systems and processes

- Nationwide Presence
- Mid-market Focus
- Over 500 successful Enterprise Systems

- Certified Oracle Partner
- Certified Accelerate Partner
- Certified PeopleSoft Reseller

- Financial Management
- Human Capital Management
- Business Intelligence
- Management Consulting



JGI is Aligned and Partnered with three key vendors

ORACLE

LAWSON

ADP

ERP Applications

Business Intelligence

Human Capital Management

Management Consulting

Oracle is the world's largest business software company, specializing in developing and marketing enterprise software products. Oracle has grown significantly through several notable acquisitions including PeopleSoft, JD Edwards, Siebel, Hyperion and BEA Systems.

Lawson Software provides solutions to 4,500 customers across 40 countries and multiple sectors, including Strategic HCM, Enterprise Performance Management, ERP, CRM, Supply Chain, Manufacturing Resource Planning, Enterprise Asset Management and industry-tailored applications.

With nearly \$9 billion in revenues and over 585,000 clients, ADP is one of the world's largest providers of business outsourcing solutions. ADP offers the widest range of HR, payroll, tax and benefits administration solutions from a single source.

Upgrade Options

- ◆ Lab Approach
- ◆ Onsite Approach
- ◆ Combination of a Lab Approach and Onsite – the Connected Upgrade

Lab Approach

- ◆ Upgrade timeline is compressed
- ◆ Repeatable and precise set of upgrade tasks
- ◆ Customizations may be included in upgraded database
- ◆ Minimizes the impact on your current production support staff
- ◆ Most upgrade issues are removed before coming on-site
- ◆ Non interactive approach – database is returned to the client for testing and validation

On Site Approach

- ◆ Traditional Upgrade Methodology
- ◆ Slower project timeline that allows for maximum knowledge transfer
- ◆ Client resources are fully involved
- ◆ Client hardware used throughout project
- ◆ Requires full time, dedicated consulting resources
- ◆ Subject to client infrastructure issues and delays

Combined Approach The Connected Upgrade

- ◆ Upgrade timeline is compressed
- ◆ Repeatable and precise set of upgrade tasks
- ◆ Minimize the impact on your current production support staff
- ◆ Knowledge Transfer of the functionality required to run your applications
- ◆ Use client hardware for performance tuning and test upgrade moves
- ◆ Approach can be done for any sized business

JGI' s Upgrade Methodology S.A.F.E

Strategic

- ◆ Best Utilization of your resources
- ◆ Timely in choice of when to upgrade
- ◆ Transforms an upgrade into a maintenance activity
- ◆ Minimizes the impact on the project timeline
- ◆ Eliminate unnecessary or redundant customizations
- ◆ Minimizes Total Cost of Ownership

Accelerated

- ◆ Methodology guarantees a repeatable and precise set of upgrade tasks
- ◆ Speeds up the upgrade process
- ◆ Standardized process allows for rapid deployment
- ◆ Customizations highlighted immediately within the upgrade process allowing more time to retrofit or remove
- ◆ Provides access to upgraded environment with client data almost immediately

Flexible

- ◆ Available during testing phase to support or supplement the functional staff
- ◆ Methodology enables us to upgrade any size customer
- ◆ Client involvement is scaled to resource availability
- ◆ Upgrade environment can be moved back on site at almost any point during the process

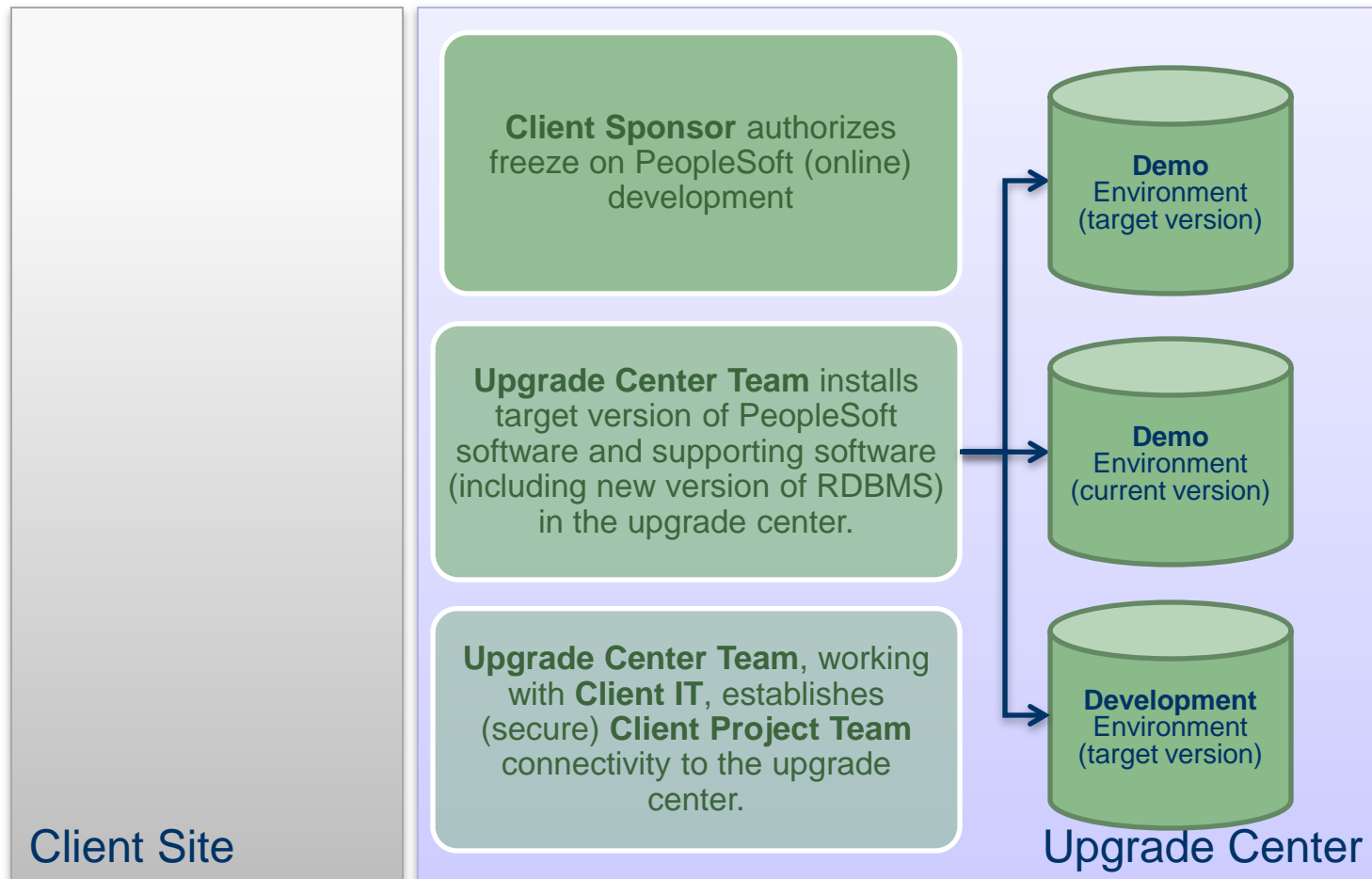
Efficient

- ◆ Upgrade issues have been removed from the upgrade process
- ◆ Seamlessly load upgraded database for end-user testing
- ◆ Balanced methodology was developed to minimize overall project timeline and cost
- ◆ Proven methods allow for predictable results

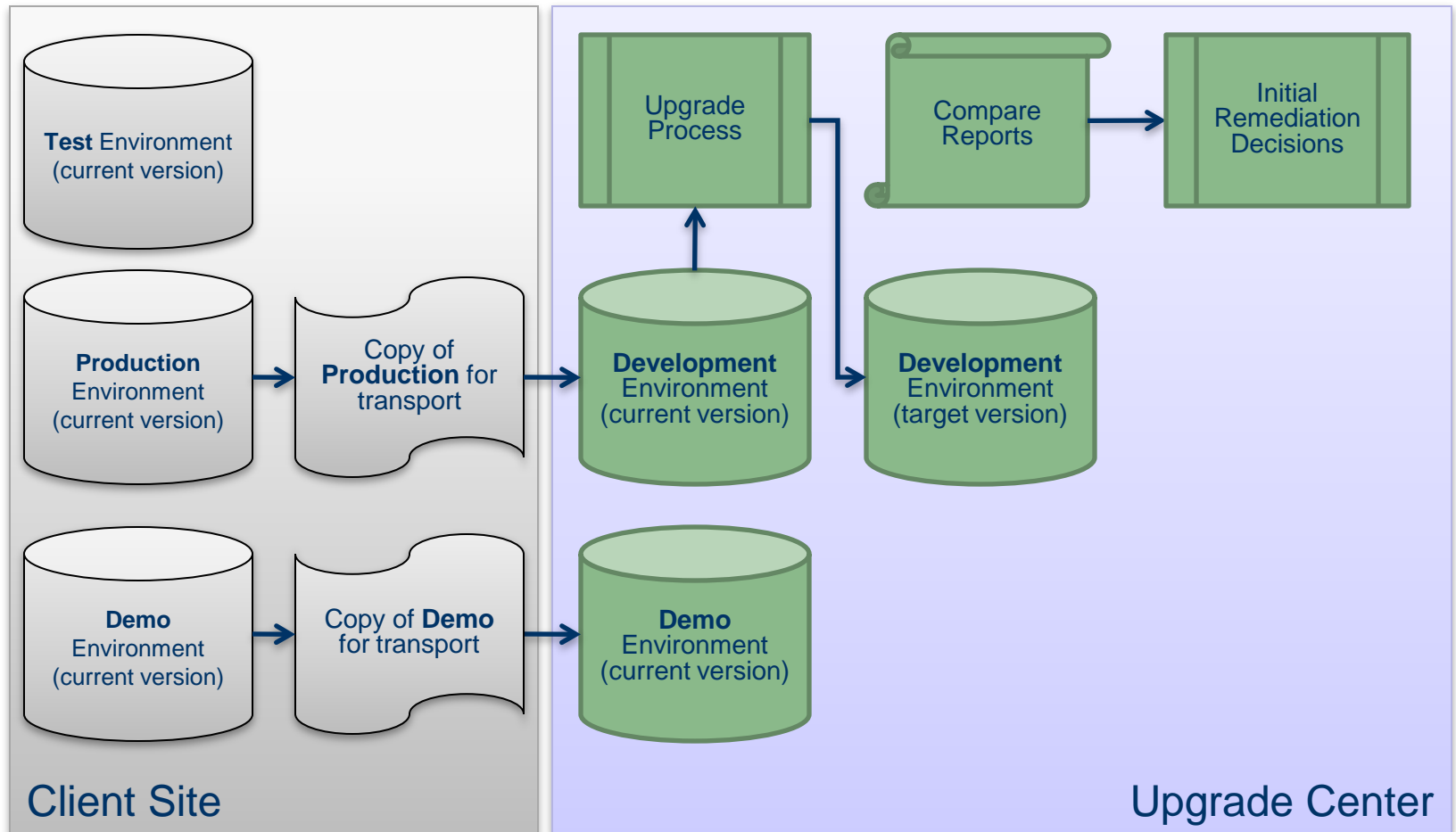
Upgrade Steps

- ◆ Prepare for Upgrade
- ◆ First Pass (initial development pass)
- ◆ Fit/Gap and Second (development) Pass
- ◆ Remediation and Functional Activities
- ◆ Third Pass (test move)/Testing
- ◆ Prepare for “Move to Client”
- ◆ Test Move to Client
- ◆ Production Move (to Client)

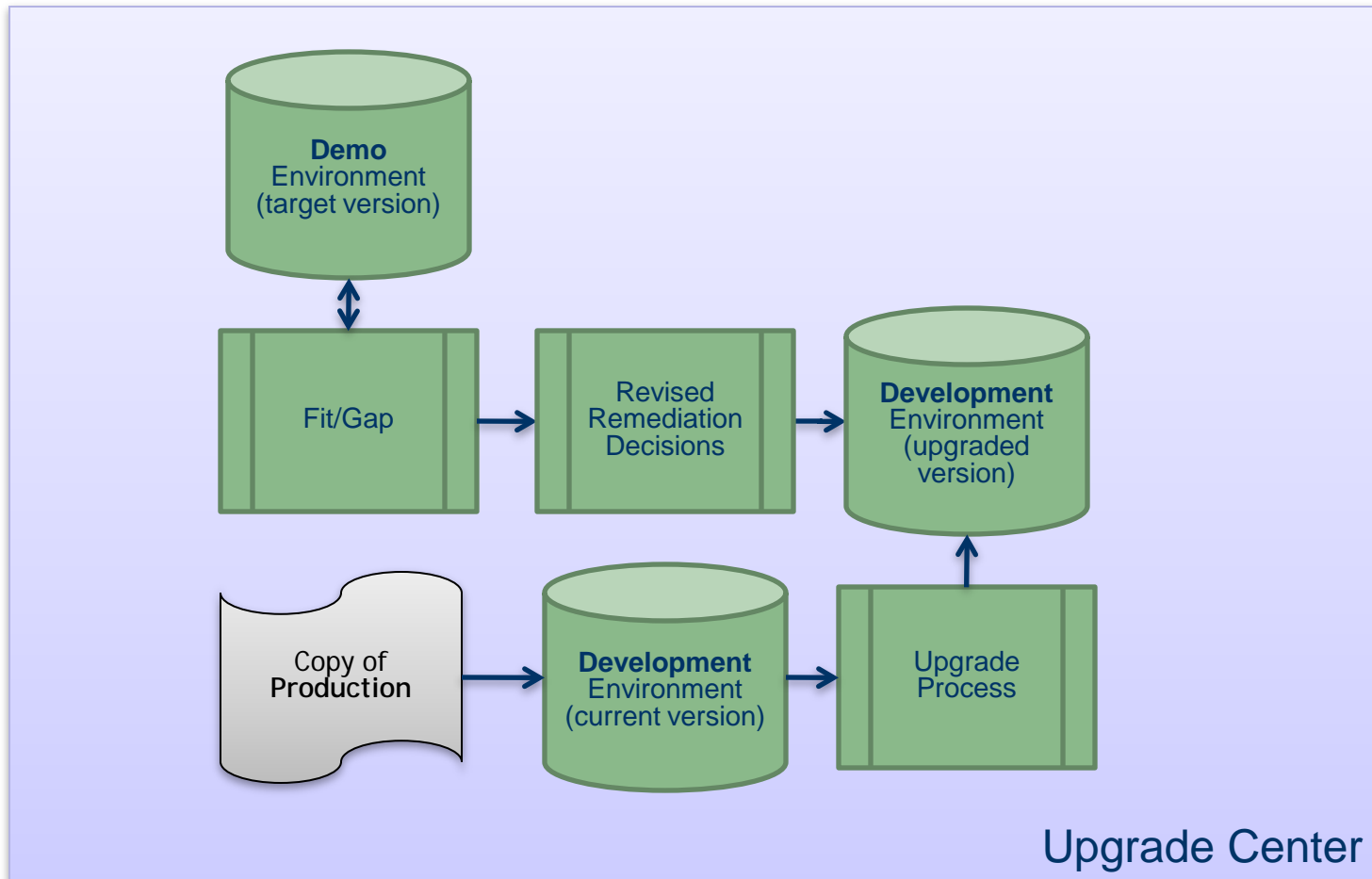
Prepare for Upgrade



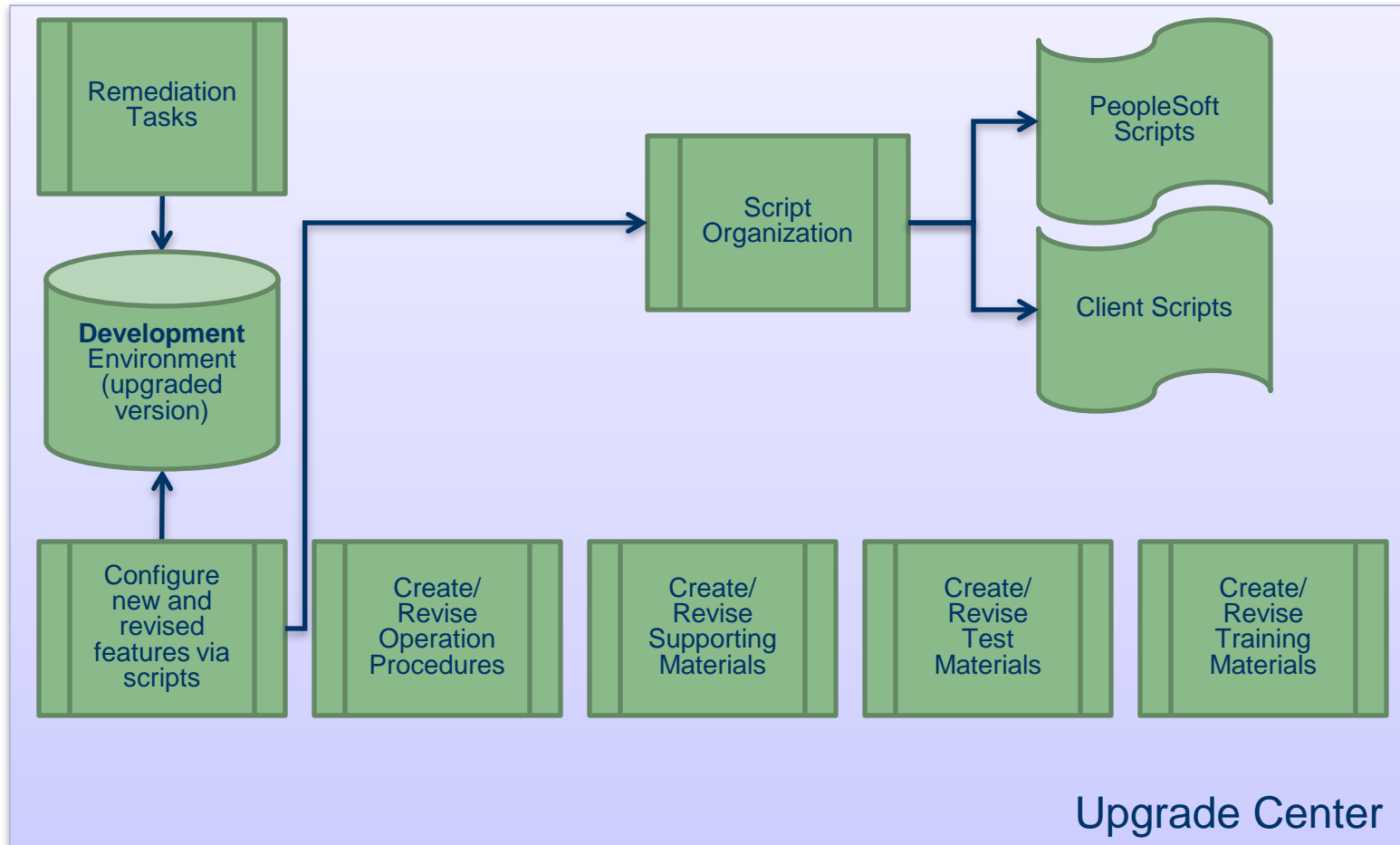
First Pass (initial development pass)



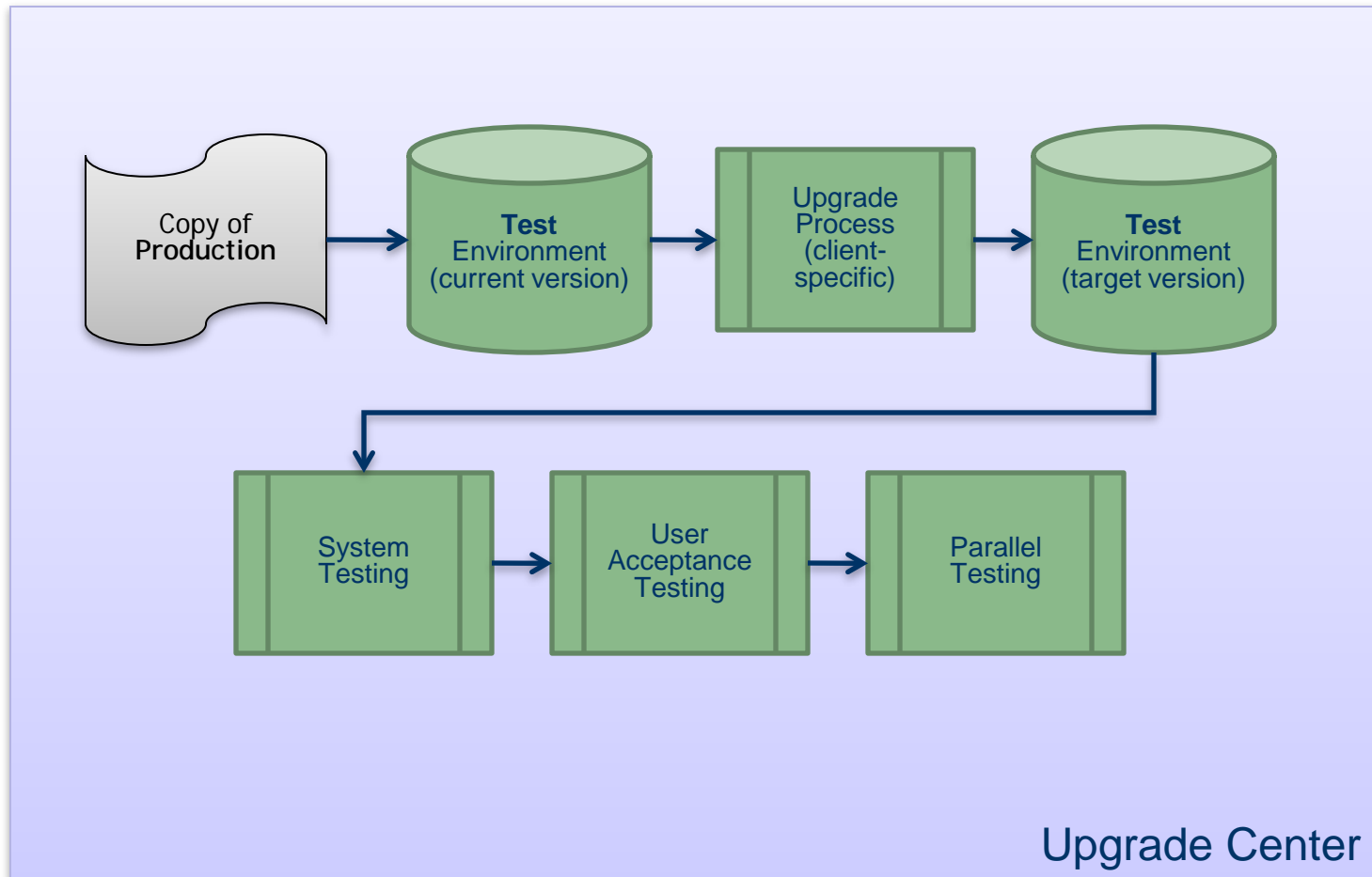
Fit/Gap and Second (development) Pass



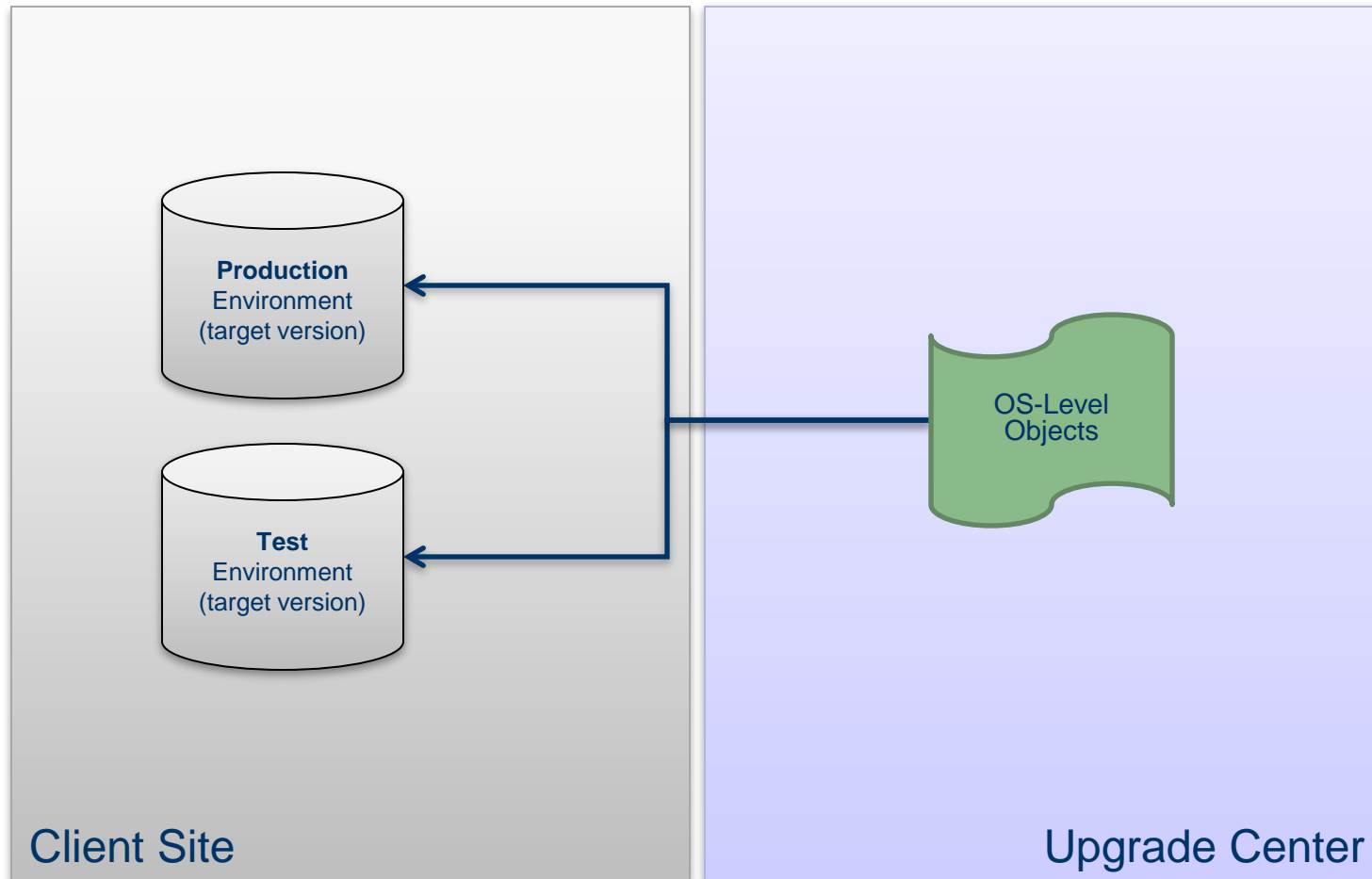
Remediation and Functional Activities



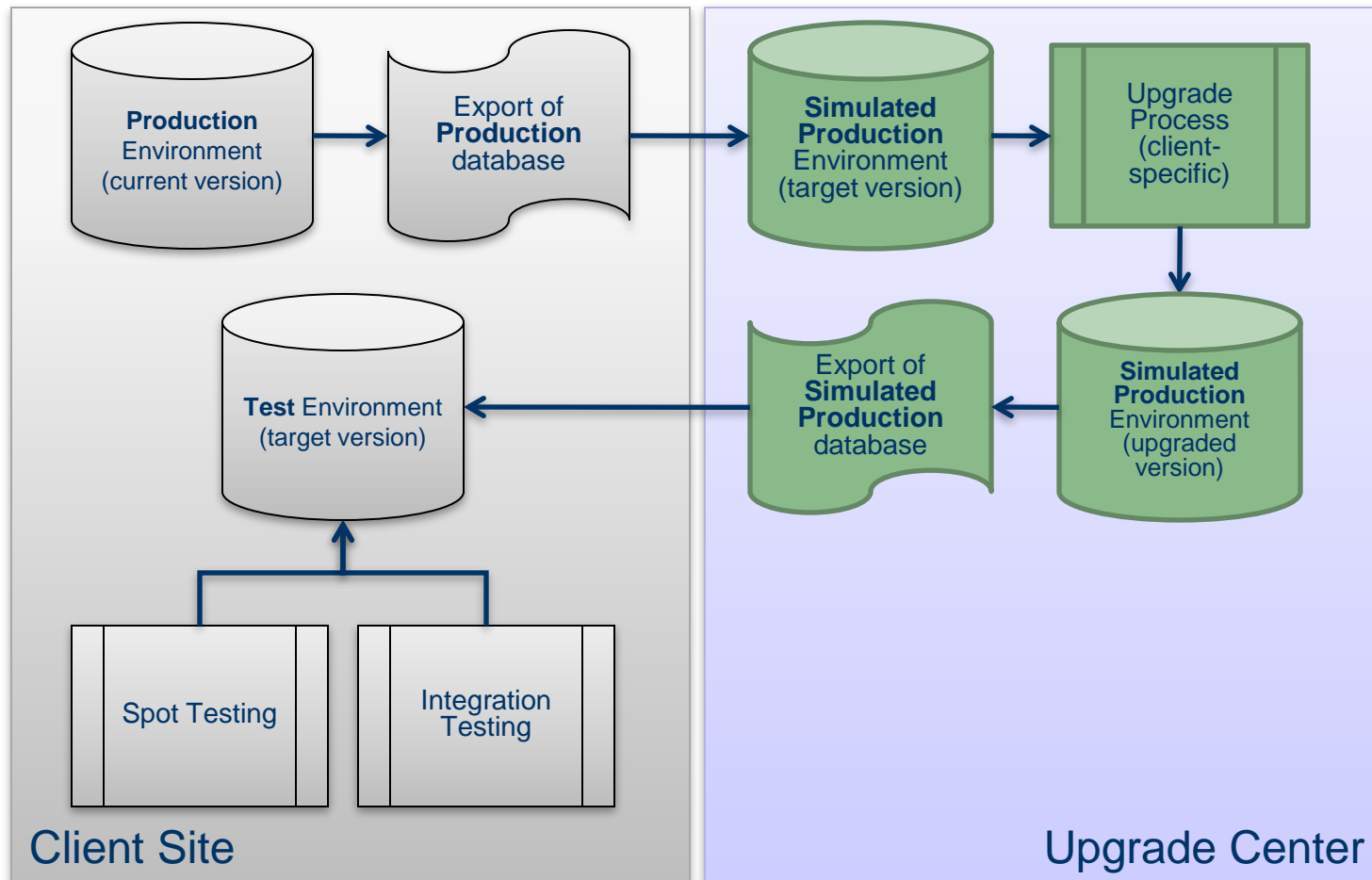
Third Pass (Test Move)/Testing



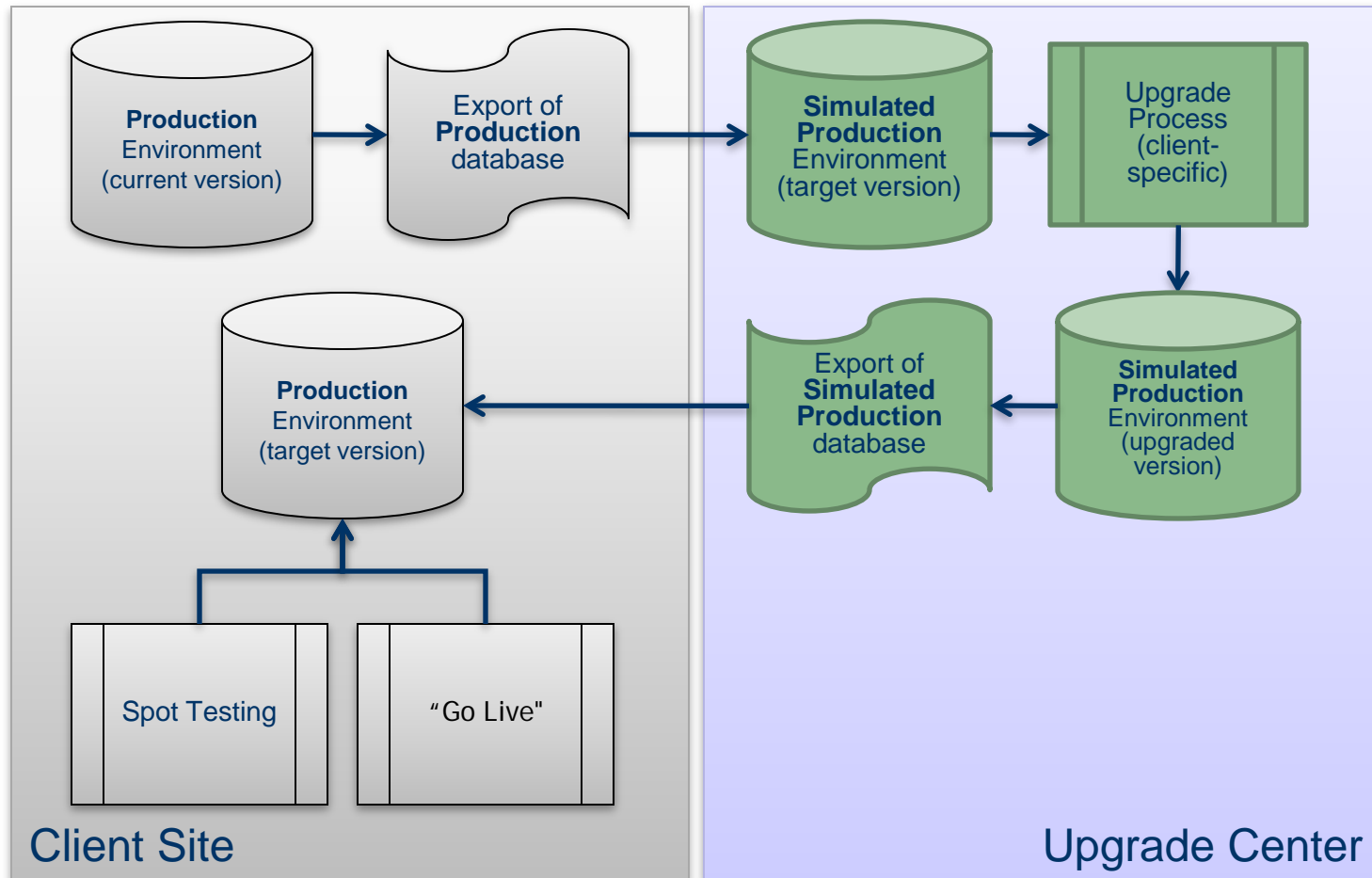
Prepare for “Move to Client”



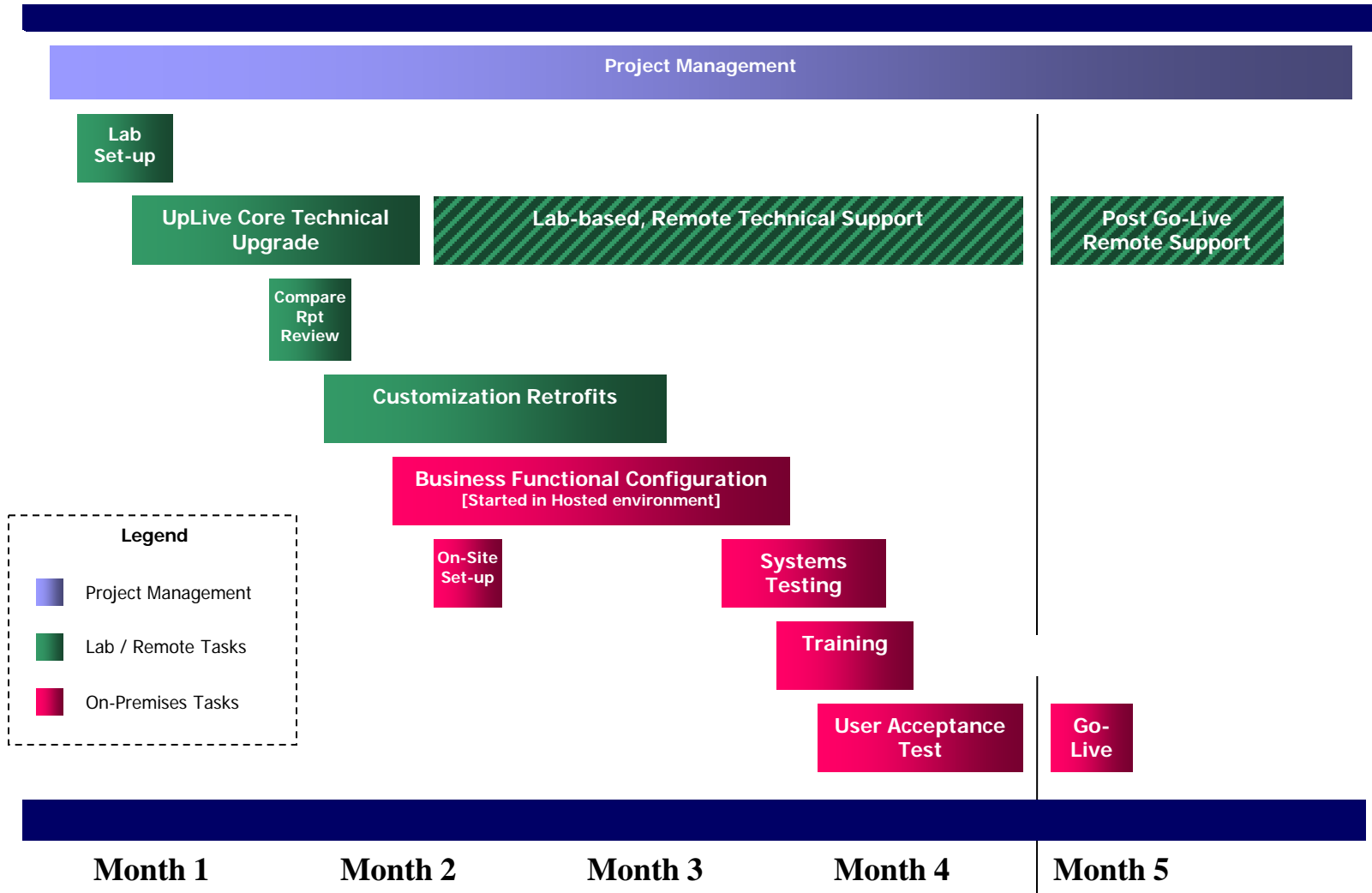
Test Move to Client



Production Move (to Client)



Upgrade Methodology & Timeline



Keys to Success - Functional

- ◆ If you haven't already, document all customizations
- ◆ Full buy-in from all functional area leads
- ◆ Allocate sufficient time and manpower for testing

Keys to Success - Technical

- ◆ Performance tune throughout the upgrade
- ◆ Get exact timings for go-live to avoid surprises
- ◆ Patch source database to current Maintenance Pack release to insure most recent production version
- ◆ Clearly script all activities, both automated and manual

Keys to Success - PM

- ◆ Effective Communication Strategy
- ◆ Solid Change Management Process
- ◆ Focus on Risk Mitigation
- ◆ Avoid Scope Creep, stay focused on upgrade

Case Study

- ◆ Major Utility Company
- ◆ FSCM
- ◆ Initial Pass Copy of Production upgrade done in Upgrade Lab
- ◆ Transitioned to On-Site for remaining Test Moves to Production, Testing and Deployment
- ◆ Done in 4 months total, from kick off to go-live
- ◆ Demonstrates the ability to leverage the connected lab to vastly accelerate the process and keep focused on the project plan

Case Study

- ◆ Large, European-based staffing firm
- ◆ HRMS
- ◆ 120,000+ employees
- ◆ 700 GB+ Oracle database
- ◆ Initial Pass Copy of Production upgrade done in Upgrade Lab
- ◆ Done in 4 months total, from kick off to go-live
- ◆ Transitioned to On-Site for remaining Test Moves to Production, Testing and Deployment

Oracle Accelerate



PeopleSoft **Specialists**

Questions?

To schedule a
Free Upgrade Assessment
or for more information
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