Upgrading Your PeopleSoft Applications

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Agenda

- Overview
- Upgrade Options
- Upgrade Methodology
- Upgrade Steps
- Case Studies
- Questions / Wrap-up
Business and Technology Services Across the Enterprise

JGI Overview

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

- Nationwide Presence
- Mid-market Focus
- Over 500 successful Enterprise Systems Implementations and Upgrades
- Certified Oracle Partner
- Certified Accelerate Partner
- Certified PeopleSoft Reseller

- Financial Management
- Human Capital Management
- Business Intelligence
- 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
Business and Technology Services Across the Enterprise

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
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)
Business and Technology Services Across the Enterprise

Prepare for Upgrade

Client Sponsor authorizes freeze on PeopleSoft (online) development

Upgrade Center Team installs target version of PeopleSoft software and supporting software (including new version of RDBMS) in the upgrade center.

Upgrade Center Team, working with Client IT, establishes (secure) Client Project Team connectivity to the upgrade center.

Demo Environment (current version)

Demo Environment (target version)

Development Environment (target version)
First Pass (initial development pass)

Client Site

- **Test Environment** (current version)
- **Production Environment** (current version)
- **Demo Environment** (current version)

Copy of Production for transport

Upgrade Center

- **Upate Process**
- **Compare Reports**
- **Initial Remediation Decisions**

- **Development Environment** (current version)
- **Development Environment** (target version)
- **Demo Environment** (current version)

Copy of Demo for transport
Fit/Gap and Second (development) Pass

Upgrade Center

- Demo Environment (target version)
- Fit/Gap
- Revised Remediation Decisions
- Development Environment (upgraded version)
- Copy of Production
- Development Environment (current version)
- Upgrade Process
Remediation and Functional Activities

- Remediation Tasks
- Development Environment (upgraded version)
- Configure new and revised features via scripts
- Create/Revise Operation Procedures
- Create/Revise Supporting Materials
- Create/Revise Test Materials
- PeopleSoft Scripts
- Client Scripts

Upgrade Center
Third Pass (Test Move)/Testing

Copy of Production → Test Environment (current version) → Upgrade Process (client-specific) → Test Environment (target version)

System Testing → User Acceptance Testing → Parallel Testing

Upgrade Center
Prepare for “Move to Client”
Business and Technology Services Across the Enterprise

Test Move to Client

Client Site

- Production Environment (current version)
- Test Environment (target version)
- Spot Testing
- Integration Testing

Upgrade Center

- Export of Production database
- Simulated Production Environment (target version)
- Export of Simulated Production database
- Simulated Production Environment (upgraded version)
- Upgrade Process (client-specific)
Production Move (to Client)

Client Site

- Spot Testing
- "Go Live"

Upgrade Center

- Export of Production database
- Simulated Production Environment (target version)
- Upgrade Process (client-specific)
- Simulated Production Environment (upgraded version)
- Export of Simulated Production database
- Production Environment (current version)
- Production Environment (target version)
Upgrade Methodology & Timeline

Legend
- Project Management
- Lab / Remote Tasks
- On-Premises Tasks

Month 1 | Month 2 | Month 3 | Month 4 | Month 5

Lab Set-up
UpLive Core Technical Upgrade
Lab-based, Remote Technical Support
Business Functional Configuration (Started in Hosted environment)
Customization Retrofits
On-Site Set-up
Systems Testing
Training
User Acceptance Test
Go-Live
Post Go-Live Remote Support
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
Questions?

To schedule a Free Upgrade Assessment or for more information contact:

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