

PeopleSoft HCM Upgrade Options

Making the move!

Your move...



*“Upgrading is analogous to moving...”**

- * Oracle White Paper “Best Practices for Upgrading PeopleSoft Enterprise” February 2007



Your Presenter



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- Practice Director, PeopleSoft HCM
 - 15 years of PeopleSoft experience
 - 18 years of HR experience
 - Experience with several upgrades
 - Helped many friends move when younger!

Considering a move...



- Is it time for a move?
- How hard will it be to move?
- Are you prepared for the move?
- Need help with your move?
- A moving crew or just a hand...



Is it time for a move?

- Maintenance costs
 - Extended support
- New functionality
 - Solves business requirements
 - Organizational readiness
 - Enhanced integration options
 - BI and reporting
- Regulatory requirements
 - Staying current with legal environment
- Retiring customizations
 - Does new application release solve issue?



How hard will it be to move?

- How far are you moving?
 - Direct path or double-upgrade?
 - 8.3 requires double-upgrade or “wrapper”
 - 8.8 or later is a one-step upgrade
- Condition of your current environment
 - All patches and maintenance applied?
 - Level of customization
 - Interfaces and reports



Are you prepared for the move?



- Managing the activities
 - Define scope “while you’re at it”
 - Secure funding
 - Build team
 - “Treat upgrade as a project”
- System data
 - Quality and quantity
 - Query strategy
 - Security strategy
- Inventory of modifications
 - Page, record or menu changes
 - Custom SQRs and Application Engines



Need help with your move?



- What we offer
 - No cost, one-day assessment including timeline, resources and cost
 - Fixed-fee detailed assessment including in-depth analysis and ROI
- Experience
 - Average of over 12 years of functional/technical experience for each consulting resource
 - PayMatch testing tool
- Full Application Life-cycle Support
 - Full range of services for implementations, upgrades and production support
 - Change Management
- Commitment to Customer Satisfaction
 - We have a proven track record of forming long-term partnerships with our clients



A moving crew or just a hand...



Outsourced

- **Who:** Customers who utilize managed applications
- **Why:** Non-core business function, resource constraints

Traditional

- **Who:** Customers preferring co-managed projects and onsite delivery
- **Why:** View upgrade cycles as strategic investment; Looking for new functionality and/or process improvements

Lab /Tech

- **Who:** Customers looking for minimalistic approach; Looking to stay supportable but not looking for process improvements
- **Why:** Severe budget and/or resource constraints; lowest cost approach

Traditional / Lab
Hybrid

- **Who:** Customers seeking benefits of Traditional upgrade but who have significant time constraints or technical staffing challenges
- **Why:** Lower cost; faster than traditional upgrade flexible approach

Staff Aug

- **Who:** Customers with their own methodology running the upgrade as an internal project; dedicated resources
- **Why:** Managed as internal project; supplement staff as necessary

“Just the Fit-gap
Please”

- **Who:** Mature customers with prior internal upgrade experience
- **Why:** Only need upgrade planning or high-level delta functionality guidance in Fit-Gap



Questions

