

# Upgrade Strategies

Leveraging archiving and test data  
management best practices

## Today's Discussion

- What Drives Upgrades Today?
- Archiving and Upgrades
  - Concepts, Benefits
  - Key Requirements
- Incorporating Archiving into the Upgrade Project
  - Archive before the Upgrade
  - Archive as part of Upgrade
- Princeton Softech Optim<sup>™</sup>

## What Drives Upgrades Today?

- 2005: Post-acquisition: uncertainties over product direction and roadmap
- 2006: Oracle unveils Lifetime Support and Applications Unlimited programs
- 2007: Applications Integration Architecture announced; Fusion Applications strategy continues to evolve
- 2008: Initial Fusion Applications release anticipated



## The Bottom Line

- Oracle sites: there's an upgrade in your future
- Taken together, Lifetime Support and Applications Unlimited extend the useful life of current applications
- AIA strengthens value proposition, especially for sites with mixed applications environments
- To take advantage of enhanced functionality and more modern infrastructures within existing applications, *eventually you'll need to upgrade*
- Gartner: "...continued maintenance and upgrade within the Applications Unlimited family compares favorably with the expected cost of migrating to Fusion Applications...."<sup>1</sup>

1. Jeff Comport & Yvonne Genovese, AIA Strengthens Applications Unlimited as a Viable Long-Term Strategy for Oracle Customers," Gartner, 2007

## Drivers of Project Success

If you measure success by ability to...

- Streamline & automate business processes
- Increase ROI from investments in ERP systems
- Reduce the time to “go live,” minimize downtime
- Improve “compliance readiness”
- Control project costs
- Improve application performance and service levels

## Drivers of Project Success

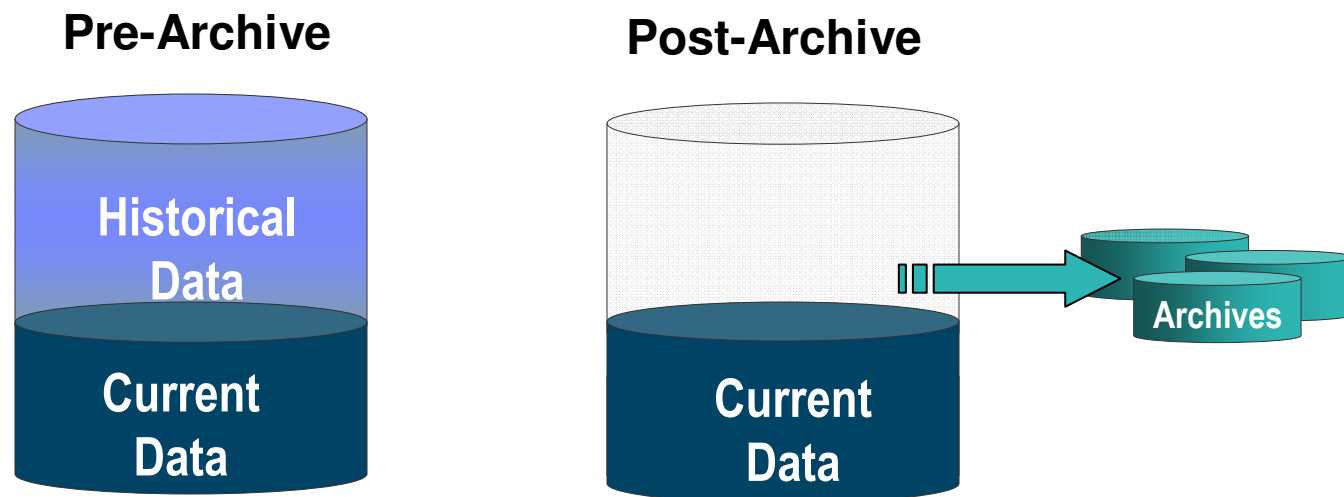
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*Archiving can play an important role in improving the success of your upgrade project*

## What is Archiving?

- Segregate historical transaction records by age, status, event or other criteria
- Copy historical records to a secure archive
- Delete transaction details from production system
- Retain access to information for query, reporting, customer service, audit and discovery requests



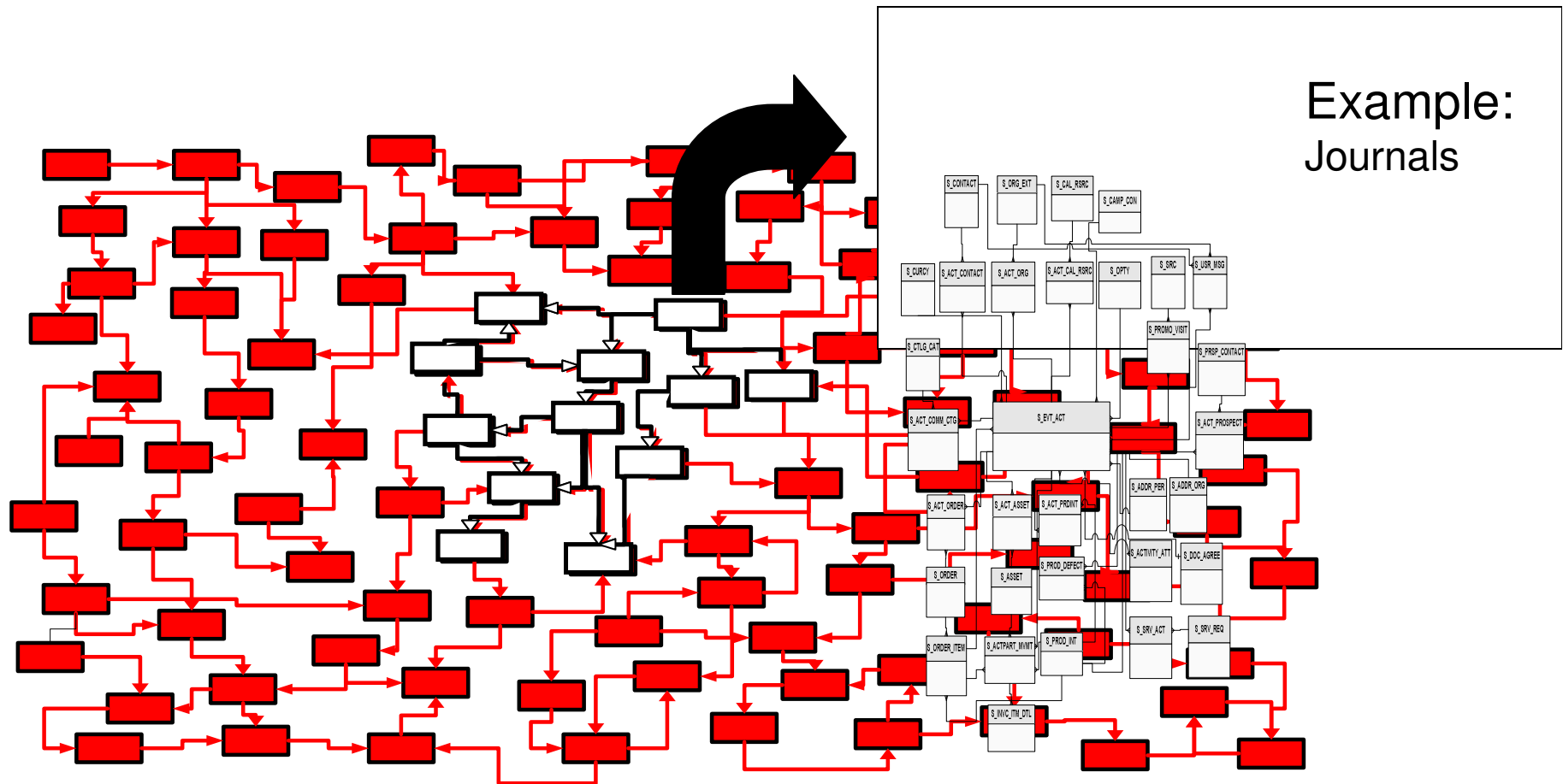
## What are the Benefits?

- Streamline the upgrade project – success from Day One!
  - Reduce downtime during conversion by 50% or more
  - Improve application performance from old version to new version by reducing OLTP workload
- Maintain a Superior Ownership Experience - ongoing
  - Reduce backup and disaster recovery time by hours
  - Lower database maintenance time for tasks like reorganizations, refreshes, clones
  - Support “compliance readiness”
  - Ensure consistent performance to Service Level objectives
  - Reduce cost of storage and overall TCO

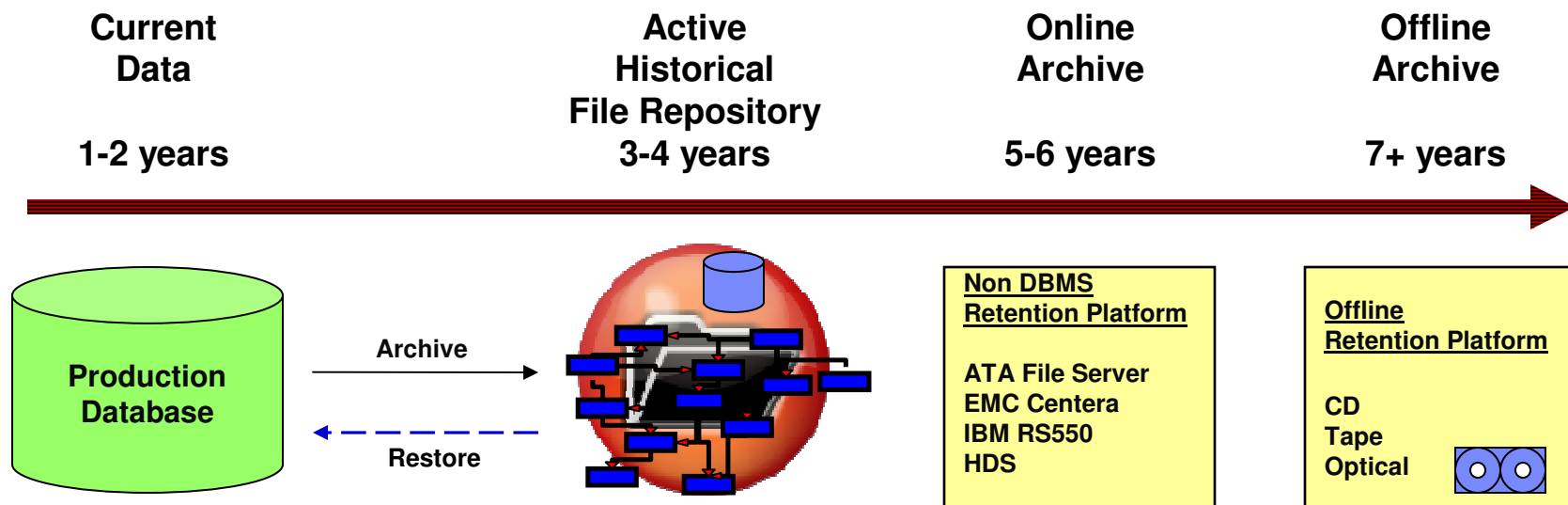
## Archiving: Key Requirements

1. Archive Complete Business Object
  - Apply Functional Condition Checks
  - Accommodate Unique Business Requirements
2. Ensure “Full Lifecycle Archiving”
  - Support data retention policies as per ILM business requirements
  - Multiple formats – DBMS, File
  - Storage options – hardware targets, tiers
  - Automate enforcement of retention & disposal policies
3. Universal Access to Archived Data
  - Native application access
  - Application independent access

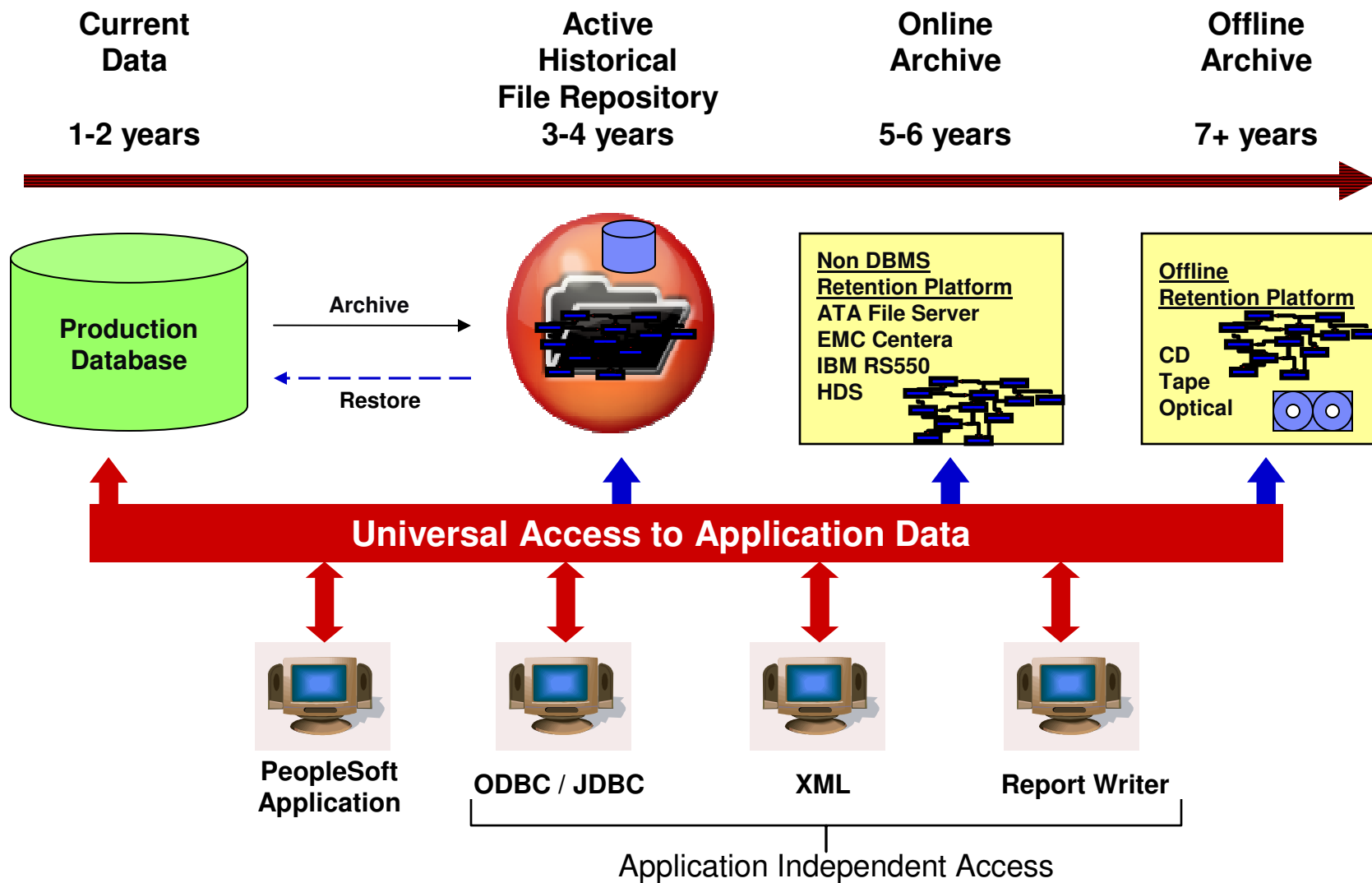
# 1. Complete Business Object



## 2. Information Lifecycle Management Support



### 3. Universal Access



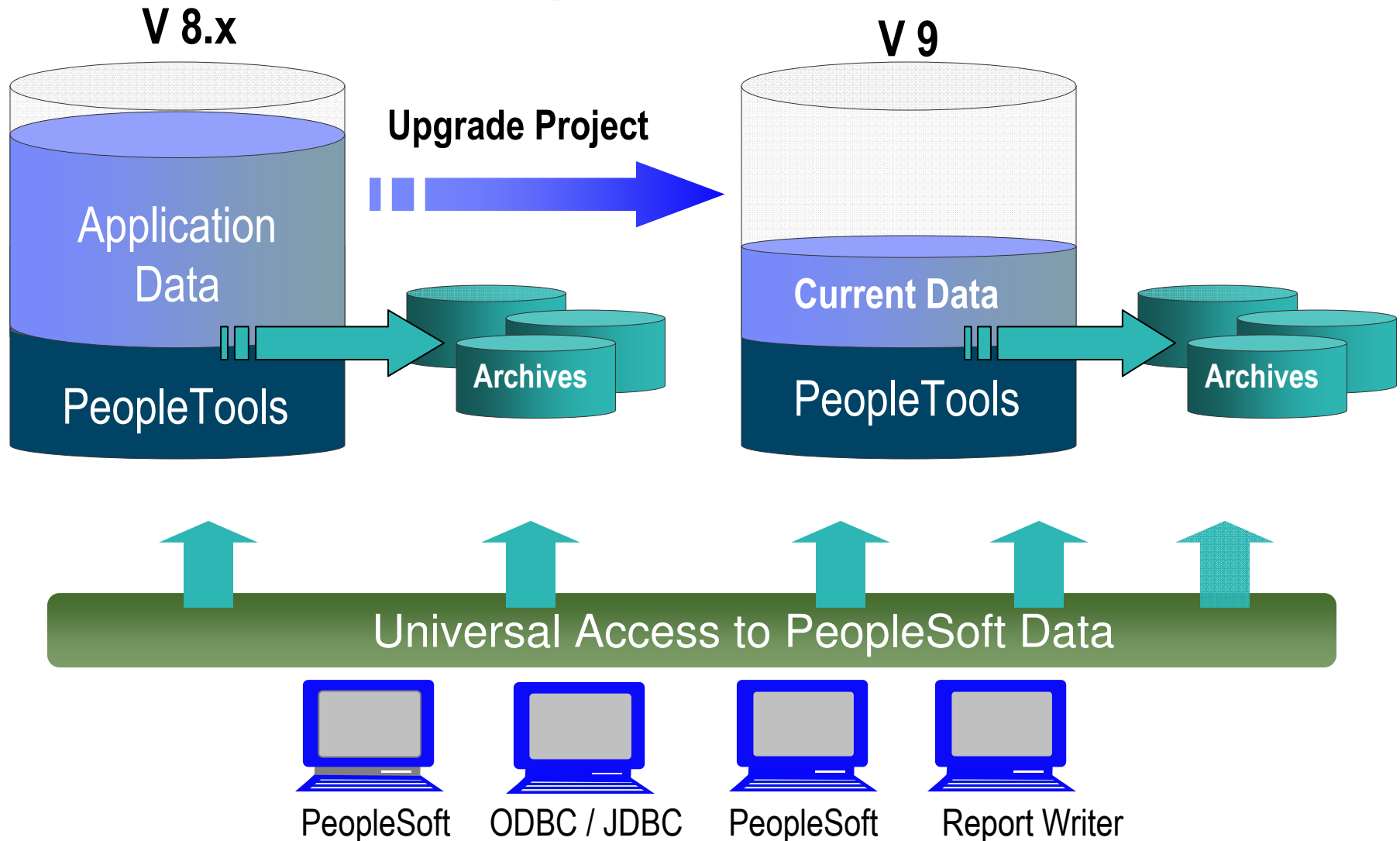
## Functional Condition Checks Example

<b>General Ledger</b>	Archive <b><i>Ledgers</i></b> and <b><i>Journals</i></b> for any <b>Accounting Period, Business Unit</b> and <b>Ledger Group</b> values
<b>Accounts Payable</b>	Archive <b><i>Vouchers</i></b> and <b><i>Payments</i></b> for any <b>Accounting Period, Bank Set ID</b> and <b>Bank Code</b> values
<b>Accounts Receivable</b>	Archive <b><i>Items</i></b> and <b><i>Payments</i></b> for any <b>Accounting Date</b> and <b>Business Unit</b> values
<b>Billing</b>	Archive <b><i>Invoices</i></b> (as well as consolidated Invoices) for any <b>Accounting Date</b> and <b>Business Unit</b> values

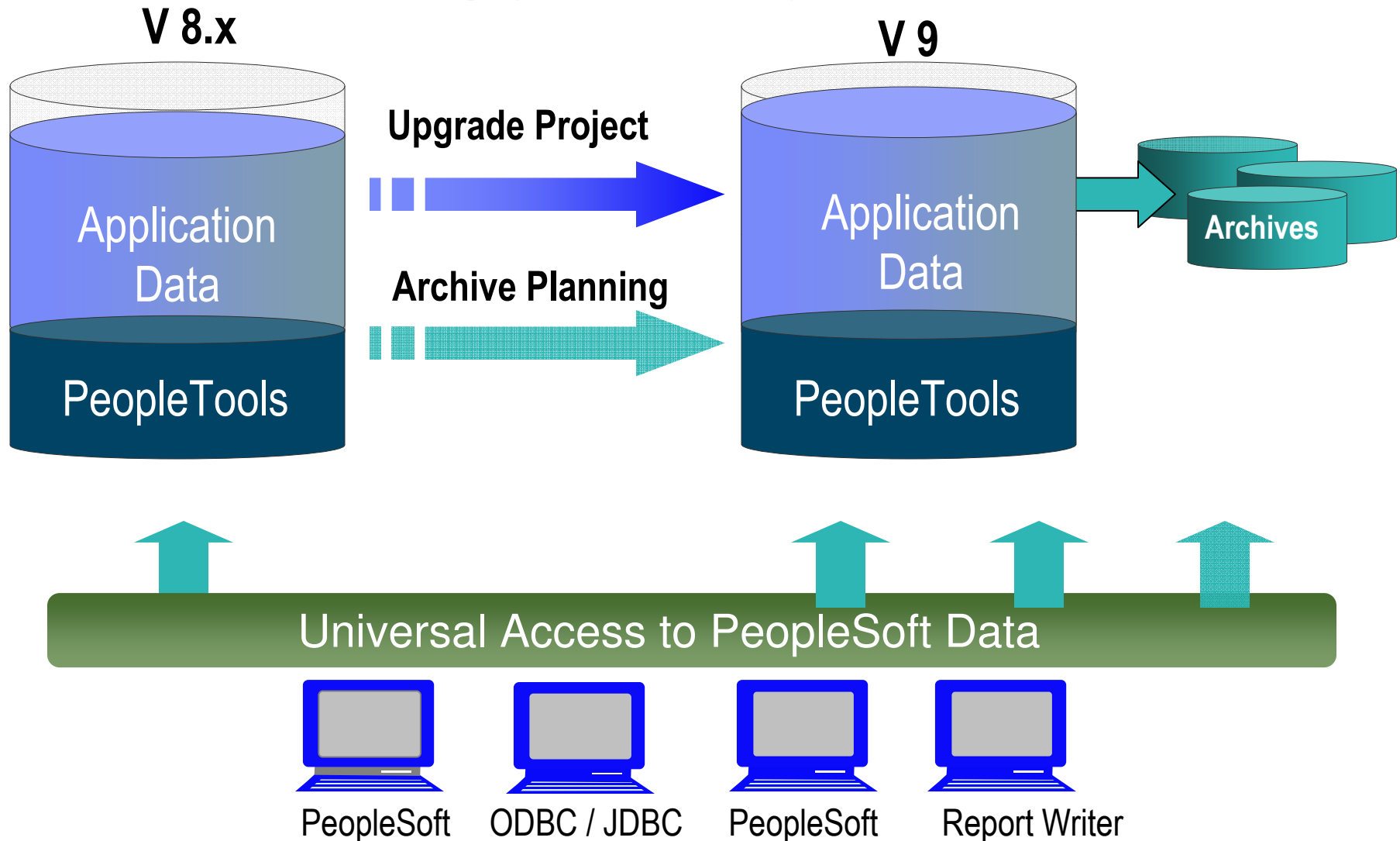
## Where does Archiving Fit?

- Archive before an Upgrade
  - Reduces amount of data to convert during production cutover
  - Reduces downtime during upgrade
- Archive in Parallel with an Upgrade
  - Combines common technical and functional tasks to save overall elapsed time
    - Technical tasks: validate individual steps (such as moving query tables forward), validating new technical environment, performance testing
    - Functional/business tasks: reconciling “before” & “after” results, regression testing on key business processes (such as payroll processing or financial close)

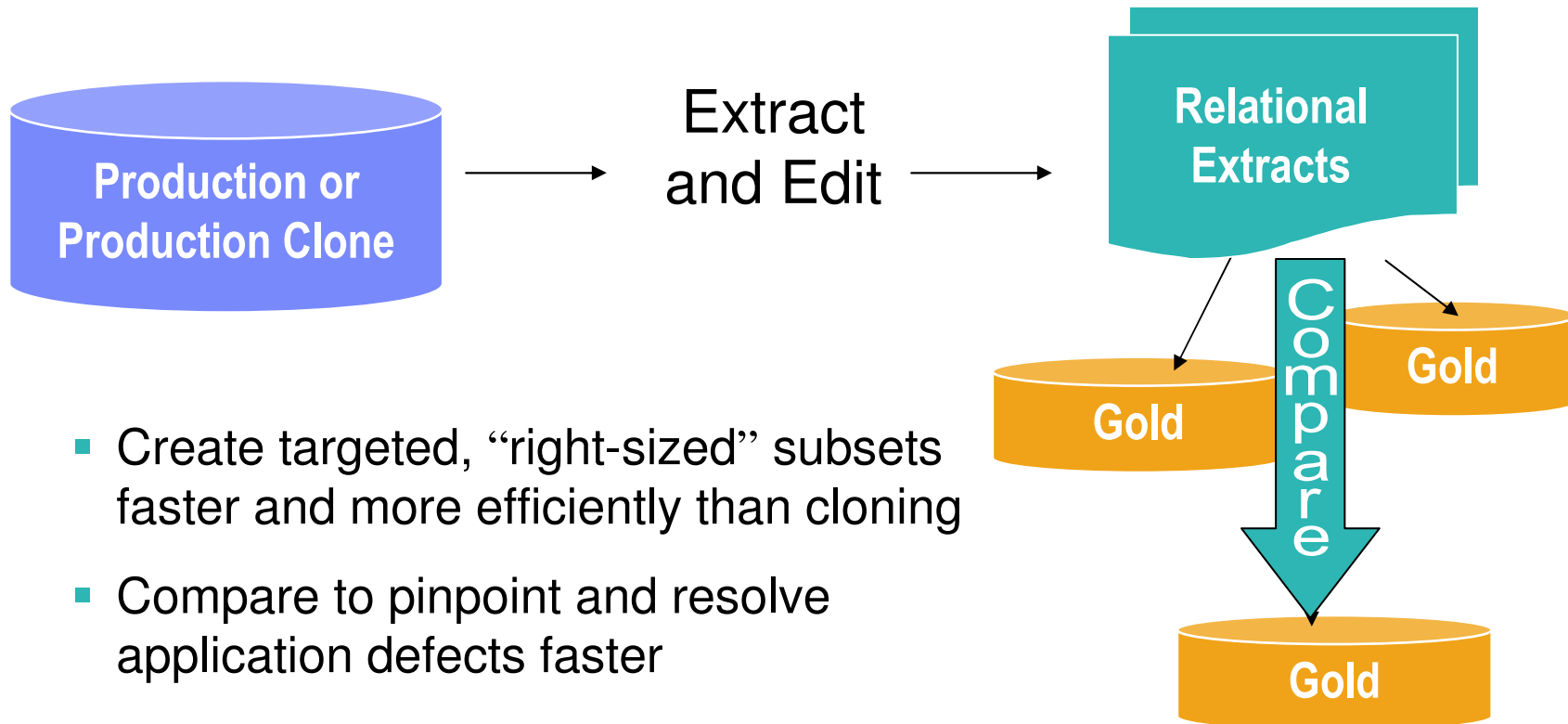
# Archive Before Upgrade



# Archive and Upgrade Projects in Parallel



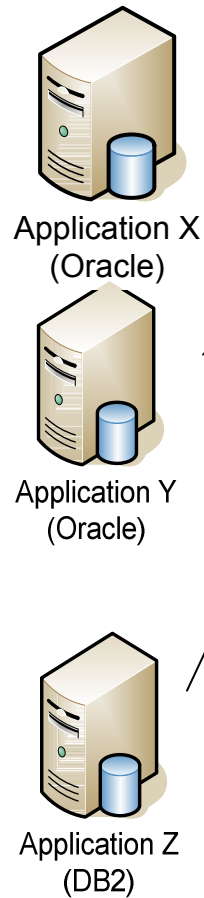
# Managing Test Data



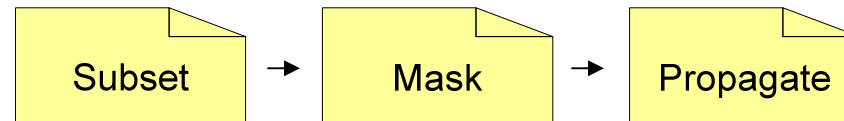
- Create targeted, “right-sized” subsets faster and more efficiently than cloning
- Compare to pinpoint and resolve application defects faster
- Improve development efficiencies

# Protecting Data Privacy

## Production

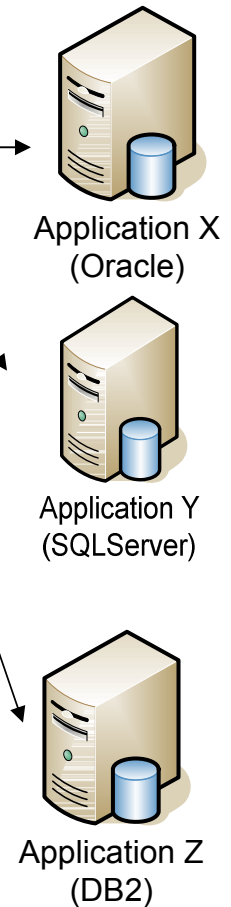


## Validate and Compare



- De-identify for privacy protection
- Deploy multiple masking algorithms
- Substitute real data with fictionalized yet contextually accurate data
- Provide consistency across environments and iterations
- No value to hackers
- Enable off-shore testing

## Test



*Ensure Data Privacy Across Non-Production Environments!*

# Success: Upgrades

About the Client:

Staffing Services, \$2 Billion

- **Application:**

- PeopleSoft Enterprise

- **Challenges:**

- Reducing costly downtime during the upgrade to the newest version of PeopleSoft Financials and HCM
- Improving service levels to support business activities for ad hoc queries, financial reporting and HCM processing
- Reducing increased audit and query response times for compliance with federal, state and local data retention requirements

- **Solution:**

- Optim<sup>™</sup> Data Growth Solution for PeopleSoft Enterprise

- **Client Value:**

- Reduced downtime costs by 66 percent by archiving prior to the upgrade to reduce database size
- Improved overall application performance by 40 percent and realized a 63 percent improvement in HCM time and labor processing by archiving historical data
- Reduced response times for compliance requirements, such as Sarbanes Oxley, by archiving data in an unalterable format that ensures fast and easy access in the event of an audit

# Success: Compliance

About the Client:

Public Utility, \$12 Billion

- **Application:**

- PeopleSoft Enterprise

- **Challenges:**

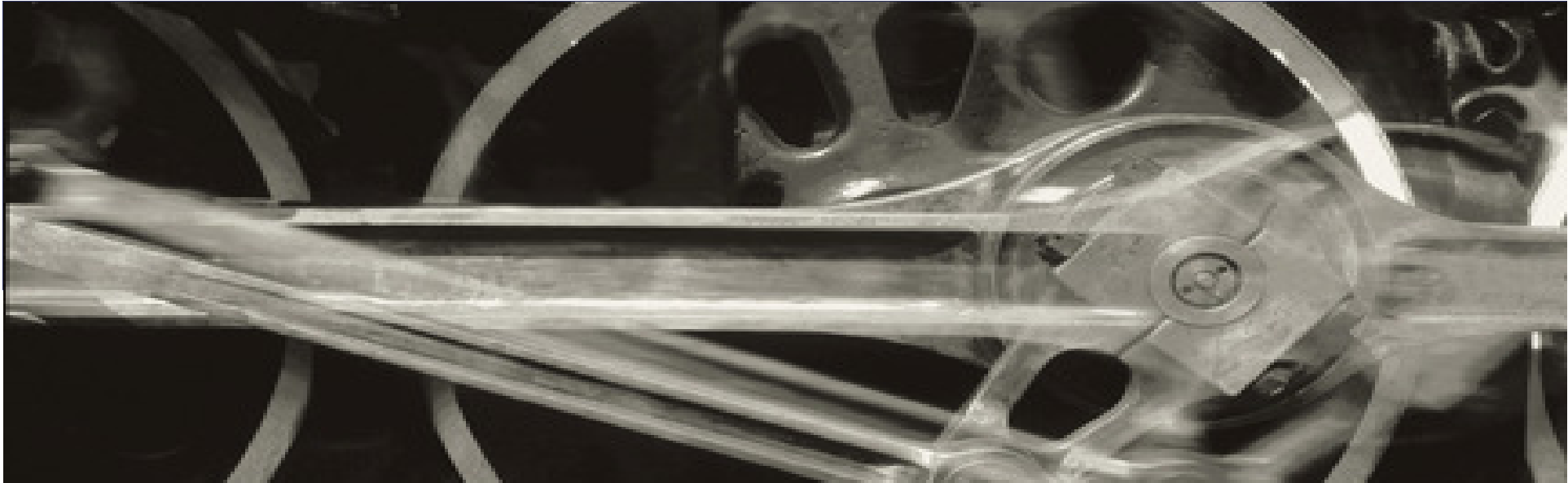
- Accessing and retrieving historical PeopleSoft Financials data (GL, AP, AR and AM) as mandated by SOX and auditor requirements after difficulties in responding to an SEC audit
- Addressing compliance and storage requirements to retain data for up to 50 years, while keeping information readily accessible
- Supporting an enterprise strategy for managing and retaining historical data across Financials and Human Capital Management applications

- **Solution:**

- Optim<sup>™</sup> Data Growth Solution for PeopleSoft Enterprise

- **Client Value:**

- Ensured support for SOX and auditor compliance requirements by implementing archiving capabilities to locate and access historical financials data when needed for audit and discovery requests
- Secured and retained critical financial data by archiving and storing directly to EMC Centera to satisfy long-term data retention requirements, while keeping information readily accessible
- Established a consistent, enterprise-wide methodology for managing and retaining historical data using Optim across applications, databases and hardware platforms



Princeton Softech, an IBM Company: Leader in  
Enterprise Data Management



# Princeton Softech

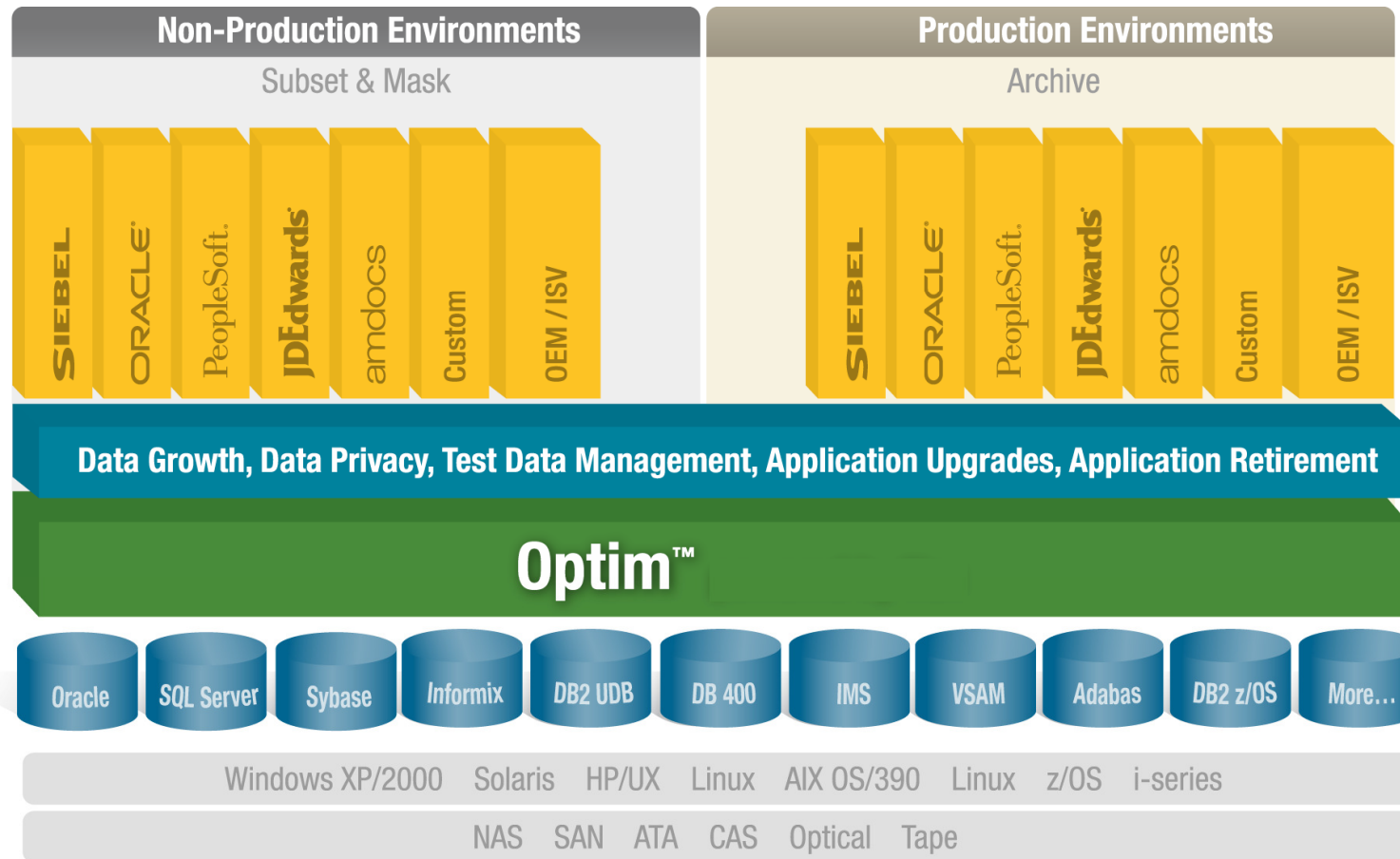
- Proven leader in Enterprise Data Management
  - Solving complex data management issues since 1989
  - In-depth functional knowledge of mission-critical applications and the business rules that govern them
  - Over 2,200 customers worldwide
    - Including nearly half of the Fortune 500
  - Only true enterprise solution: across applications, databases, hardware platforms and operating systems

# Evolution of Partnership

- PeopleSoft Tools and Technology Partner
  - Regular meetings with PeopleSoft development
  - Pre-GA software access
- January 2006: Oracle Consulting partnership to speed deployment of Optim™ enterprise data solution
- Only Oracle partner offering a single, consistent data management solution – validated by Oracle and applicable across entire Oracle stack
  - E-Business Suite, Oracle E-Business Suite, JD Edwards EnterpriseOne, Retek, Siebel
  - All custom and packaged applications running on Oracle databases



# Optim: Enterprise Architecture



- A common enterprise framework, methodology, and skill set ...
- One vendor, one platform, many solutions ...

# Some ERP Archiving Clients



THANK YOU

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