

# PeopleSoft ERP Upgrade Guide



## What you need to know about upgrading your PeopleSoft ERP applications

Oracle continues to support and develop PeopleSoft Enterprise software for the future. If your organization is on an older release of PeopleSoft, now is the perfect time to start exploring your upgrade options.

- Extend the lifetime of your investment by continuing to take advantage of Oracle's highest levels of support.
- Take advantage of application improvements and additional functionality in both technology and business functionality.
- Prepare yourself for the future of PeopleSoft and Fusion applications.

### Product Retirement Roadmap

Oracle provides three levels of PeopleSoft Application Support under their published Lifetime Support Policy. Premier Support and Sustaining Support are provided under normal licensing and maintenance fees. Extended Support requires additional licensing fees.

#### PeopleSoft Enterprise Support Coverage

Release	Premier Support	Extended Support*	Sustaining Support
HRMS 8.0 SP1	Mar 2007	Not Available	Indefinite
HRMS 8.3	Mar 2008	Not Available	Indefinite
HRMS 8.8	Dec 2008	Dec 2011	Indefinite
HRMS 8.9**	Dec 2010	Dec 2012	Indefinite
HRMS 9.0**	Dec 2012	Dec 2014	Indefinite
HRMS 9.1***	Sep 2014	Sep 2017	Indefinite
FINS 8.4	Mar 2008	Not Available	Indefinite
FINS 8.8**	Dec 2009	Dec 2011	Indefinite
FINS 8.9**	Aug 2011	Aug 2013	Indefinite
FINS 9.0*	Sep 2012	Sep 2014	Indefinite

\*Note: Extended Support Requires Additional License/Maintenance Fees

\*\* Direct Upgrade Path to Fusion Applications

\*\*\* Based on Oracle Lifetime Support Policy and Sep 2009 General Availability

#### PREMIER SUPPORT – 5 years from General Availability release

- New releases
- Technical support
- Updates, fixes, and tax/regulatory updates
- Upgrade scripts
- Certification for new third party and Oracle products

#### EXTENDED SUPPORT – Additional 3 years after Premier Support ends

- New releases
- Technical support
- Updates, fixes, and tax/regulatory updates
- Upgrade scripts
- Certification for new third party and Oracle products

#### SUSTAINING SUPPORT – Indefinitely with licensed products. Begins at the end of Premier Support or at the end of Extended Support if purchased.

- New releases
- Technical support
- Access to My Oracle support
- Updates and fixes created during Premier Support period (no new updates, fixes, and tax/regulatory updates)
- Upgrade scripts created during Premier Support period (no new upgrade scripts)
- No certification for new third party and Oracle products

#### PeopleSoft Enterprise Upgrade Paths

Release	Transitional Release	New Release
HRMS 7.51*	HRMS 8.8	HRMS 9.0/9.1
HRMS 8.0 SP1*	HRMS 8.9	HRMS 9.0/9.1
HRMS 8.3*	HRMS 8.9	HRMS 9.0/9.1
HRMS 8.8		HRMS 9.0/9.1
HRMS 8.9		HRMS 9.0/9.1
HRMS 9.0		HRMS 9.1
FINS 7.5*	FINS 8.8	FINS 9.0
FINS 8.0*	FINS 8.9	FINS 9.0
FINS 8.4		FINS 9.0
FINS 8.8		FINS 9.0
FINS 8.9		FINS 9.0

\* Requires 2 step upgrade process

## Upgrading to Version 9.1?

Oracle released HRMS 9.1 in September 2009 and is scheduled to release the remaining 9.1 PeopleSoft Enterprise applications in Q4 2009. Right now, you can be preparing for this upgrade by performing the following activities:

- Technical and functional readiness assessments
- Upgrade planning
- Enhanced functionality reviews
- Upgrade to PeopleTools 8.50 (available now) to take advantage of updated technology and user interfaces

eVerge Group can help guide you through this process by providing insight into the updated applications and the 9.0 vs. 9.1 decision.

## The eVerge Group Upgrade Solution

The eVerge Group Upgrade Solution begins with an assessment of your existing PeopleSoft system. As your upgrade partner, we will help you identify the ideal PeopleSoft configuration that will provide the greatest ROI for your organization.

Our Senior Consultants will help you to answer questions such as:

- Does our release have a supported upgrade path?
- Should we re-implement or upgrade?
- How long will it take?
- What is the most cost efficient way to upgrade when we have limited resources available?
- Can we implement new features or modules during an upgrade?

## The eVerge Group Upgrade Services

eVerge Group understands that every organization is different; there is no one-size-fits-all solution. Therefore, flexibility is a key component to an eVerge Group upgrade. Based on the unique requirements of your PeopleSoft implementation and your available resources, eVerge Group will recommend a mixture of services to provide you with a flexible upgrade solution.

An eVerge Group upgrade solution may consist of one or any of the following services:

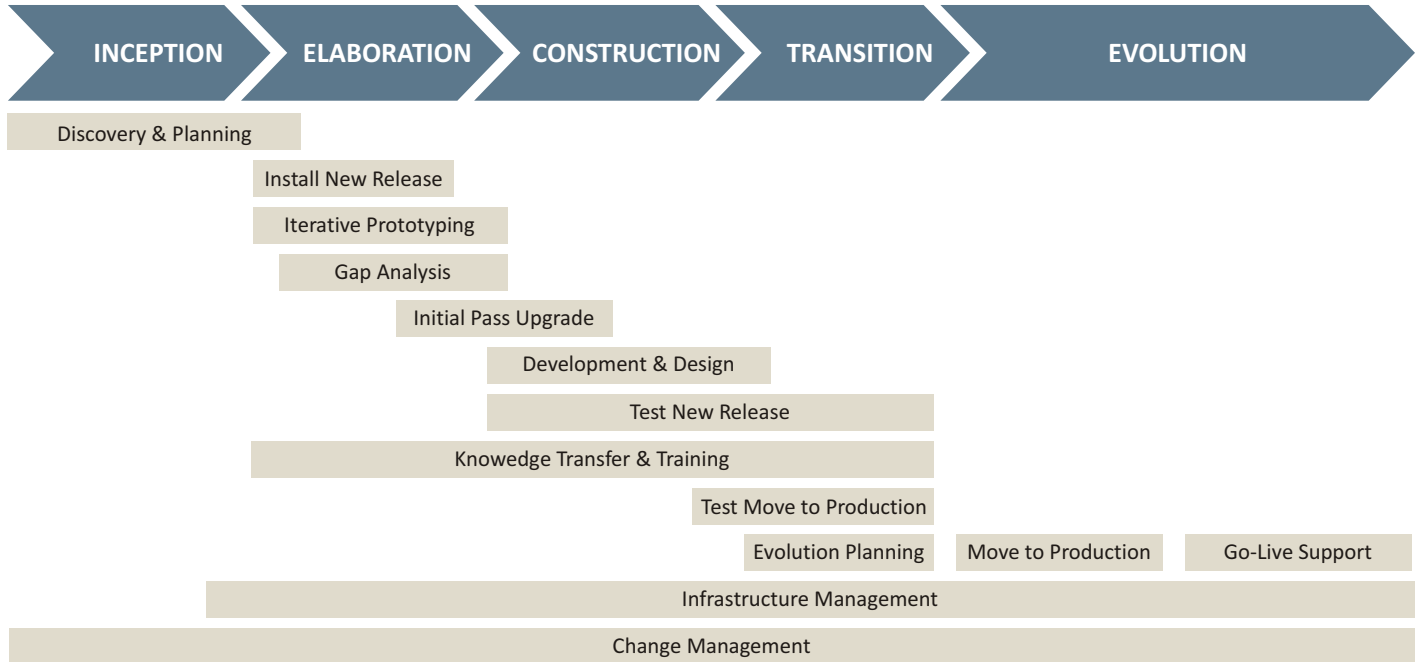
Is this you?	eVerge Service	Description
Interested in learning about new functionality to implement in an upgrade	Functional Assessment	eVerge Group resources will quickly advise the client regarding the impact of new functionality or new module implementation on existing business processes and existing customizations.
Interested in learning about what is needed technically for an upgrade	Technical Assessment	eVerge Group resources will perform an upgrade readiness assessment of the current application architecture environment.
Limited Resources - Needs assistance in all aspects of the upgrade	Full Service Upgrade	eVerge Group resources will participate in everything from initial planning through go-live and post-production support.
Strained Resources - Needs limited assistance completing an upgrade	Supplemental Upgrade Staff	eVerge Group resources will supplement organization staff.
Limited Resources - data security concerns, no infrastructure constraints	Remote Services Upgrade	eVerge Group technical staff will remotely access the client environment to perform all phase of the upgrade.
Resource and infrastructure constraints limit ability to complete a full onsite upgrade. Simple implementations with limited customizations	Lab Services Upgrade	eVerge Group technical staff will copy the client database to external media for transport to the eVerge Group upgrade lab. eVerge Group will perform the initial pass and first move to production pass in our lab. The infrastructure and final move to production pass will be performed on client hardware.
Desire to implement additional functionality or modules during the upgrade	Additional Functionality Implementations	eVerge Group functional staff will work onsite with your resources to implement desired functionality.

## Additional Services

Management	Technical	Functional	Support
Business Process Review	Software Installation	Independent Testing	Performance Tuning
Upgrade Planning	Database & Platform Conversion	Training	Production Support
Project Management	Data Masking	Documentation	Database Administration
Change Management	Data Archiving	Customization Review	Patch Application
Quality Assurance	Peopletools Upgrade	Workflow Enhancement	
IT Outsourcing	Go-live Services		

## eVerge Group PrecisionFit® Upgrade

eVerge Group has structured PeopleSoft Upgrades into a series of steps using our **PrecisionFit®** Process. This enables your organization to utilize any or all of our Upgrade Solution to ensure a successful upgrade.



## eVerge Group Accelerators

eVerge Group has developed a number of tools that leverage past experience to expedite the upgrade process.

Accelerator	Upgrade Benefit
<b>FileAnalyzer</b>	FileAnalyzer will identify, merge and synchronize differences between file based objects among PeopleSoft environments, decreasing the time required to upgrade these objects in your environment.
<b>AppModAnalyzer</b>	AppModAnalyzer will identify all customized or modified PeopleSoft Application or PeopleTools objects in your environment. This will aid in the scope and gap determination during the upgrade process.
<b>CompReportAnalyzer</b>	Automate the review of your compare reports and upload the action column to your upgrade project automatically with eVerge Group's CompReportAnalyzer tool. End the manual update errors today!
<b>DataSecure</b>	Is your organization concerned about Data Security issues during upgrades and testing? Have audits identified gaps in your security in non-production databases? Are you looking for a way to satisfy HIPAA regulations and safeguard SSN's, employee data, bank accounts, and sensitive financial information in your databases? eVerge Group recognizes your data must be secure at capture, during transit and at rest. DataSecure is the eVerge Group solution that will obfuscate sensitive data in non-production databases to protect this at rest data. This can be especially useful during an upgrade, as many times you will have non-employees with access to employee data. The functional and technical expertise of eVerge Group resources can help you identify what to protect and how to protect it.

**To find out more about how  
 eVerge Group can make your upgrade a success,  
 contact Edward Richa at 972-398-5922  
 or at richae@evergegroup.com.**

## Client Testimonials

"eVerge Group was flexible in their approach - they supported us the way we wanted to be supported, which allowed us to do the upgrade very cost-effectively."

**Rodney Palesano**, Manager-  
Employee Services, Western  
Farmers Electric Cooperative

"Our upgrade was one of the smoothest I have experienced. I attribute much of that to the professionalism, expertise, and dedication of the eVerge personnel. We are fortunate to have eVerge as a partner."

**Dave Pounds**, Director of  
Information Technology, NTTA

"eVerge Group understood our needs and provided the best people possible to make sure they were met. They exceeded our expectations."

**John Farmer**, IT Project Manager,  
American Heart Association

"With eVerge's fast-track approach and expertise with PeopleSoft, we were able to implement the software in a very short timeframe."

**Laura Johnson**, Finance Director,  
City of Oklahoma City

## eVerge Group Experience

eVerge Group has been implementing and upgrading PeopleSoft applications since 1993, when it was one of the original PeopleFriend partners. The chart below details our most recent PeopleSoft projects.

Client	Financials	HCM
<b>American Heart Association</b>		9.0 Re-implementation Ongoing Support
<b>City of Fort Worth</b>		9.0 Implementation
<b>City of Fresno</b>		8.9 Upgrade
<b>City of Oklahoma City</b>	8.4 Implementation 8.9 Upgrade Ongoing Support	8.3 Implementation 8.9 Upgrade Ongoing Support
<b>City of Plano</b>		7.5 Implementation 8.3 Upgrade 8.9 Upgrade Ongoing Support
<b>DFW Airport</b>		8.3 Implementation 8.9 Upgrade Ongoing Support
<b>Elgin Public Schools</b>	Ongoing Support	Ongoing Support
<b>Harden Healthcare</b>	9.0 Implementation	
<b>La Madeleine</b>		8.9 Upgrade
<b>North Texas Tollway Authority</b>	8.0 Implementation 8.4 Upgrade 9.0 Upgrade Ongoing Support	8.0 Implementation 8.3 Upgrade 9.0 Upgrade Ongoing Support
<b>Oakland County, MI</b>	8.8 Implementation	8.8 Upgrade
<b>Orleans Parish Criminal Sheriff's Office</b>		7.5 Implementation 8.3 Upgrade 8.9 Upgrade Ongoing Support
<b>San Diego Unified School District</b>	8.9 Upgrade	
<b>South Carolina State Ports Authority</b>	9.0 Re-implementation	9.0 Implementation
<b>Southern Methodist University</b>		9.0 Implementation
<b>Susan G. Komen for the Cure</b>	9.0 Implementation	
<b>University of North Texas</b>		8.9 Upgrade
<b>Western Farmer's Electric Coop</b>	8.9 Upgrade	8.9 Upgrade
<b>Wichita Public Schools</b>		9.0 Upgrade

## About eVerge Group

As a long-standing Oracle Partner, eVerge Group delivers world-class consulting services with the highest level of expertise and the widest range of flexibility. Our consultants are all Oracle-certified with solid technical experience, broad functional knowledge and hands-on industry expertise.

eVerge Group's proven best practices, experienced consultants, and commitment to excellence combine to help deliver true business value and return on investment through CRM, BI, MDM, ERP, ICM, and ECM solutions. We have delivered results for customers in commercial, public sector, and not-for-profit industry segments.

### eVerge Group facts:

- Founded in 1993
- Dedicated to Oracle CRM, ERP, and Fusion Middleware
- Pioneer in Oracle BI and Master Data Management
- Focused on delivering business value
- Committed to customer satisfaction
- Impeccable customer references



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