

WHY SMARTERP?

FOR A BEST-IN-CLASS ENTERPRISE

- Enhance Productivity
- Paperless Processing
- Security & Compliance
- Automate & Streamline Business Processes
- Transactional Analytics & Business Intelligence
- Rich User Experience
- Enterprise Integration

COST-EFFECTIVE UPGRADES:

- Our upgrade service provides a rapid and cost-effective upgrade to PeopleSoft Enterprise 9.
- Smart Solutions to dramatically improve your business processes and avoid customizations are offered at No Cost
 - o Employee Onboarding
 - o Electronic Forms
 - o Vendor Onboarding
 - o Segregation of Duties
- Automated test scripts for standard PeopleSoft business processes are offered at No Cost
- Fixed price upgrades

SMARTERP LAB COMPARATIVE OVERVIEW

For a low-risk accelerated upgrade, we assemble a DEMO database matching your current release including your licensed application modules. We will then compare your production system to this DEMO to identify all of your customizations. The major technical aspects of a PeopleSoft application upgrade include:

Upgrade Phases
Preparation
Evaluation
Upgrade Compare/Reports/Copy
Analysis of Reports
Alter Phase
Convert Data
Clean up and Testing
Test Move(s) to Production
Move to Production

By using our process, almost 90% of the technical upgrade is performed by the SmartERP Lab thus relieving your organization from these tasks. While the preparation phase needs to be performed by you, SmartERP can assist with this planning and preparation by making sure you understand everything that is involved in an upgrade.

SmartERP will perform the next phase of the process--evaluating the level of customizations in your database. Next, we will create the compare reports, analyze them and copy in the new objects. Although this represents only one phase, this is the most time consuming phase of the process. This is followed by performing the alter and data conversion phases and finalized with SmartERP completing the cleanup in the next phase. You finish the process by performing the integration testing and executing the Move to Production.

The following chart illustrates how much of the effort is performed by the SmartERP Lab:

Client	SmartERP Lab
Preparation	Preparation
Installation of New Release	Installation of New Release
Evaluation	Evaluation
Upgrade Compare/Reports/Copy	Upgrade Compare/Reports/Copy
Analysis of Reports	Analysis of Reports
Alter Phase	Alter Phase
Convert Data	Convert Data
Cleanup and	Cleanup
Test Move(s) To Production	Support Test Move(s) to Production
Final Move to Production	Support Final Move to Production

THE SMARTERP LAB UPGRADE PROCESS

PREPARATION

The first step is to arrange for your database to be packaged and delivered to us. The SmartERP Lab will provide the scripts necessary to accomplish this task. These scripts are designed to package the database with the objects needed to perform the upgrade but not compromise the confidentiality of your data. For this reason, tables containing your sensitive or confidential information are not brought into the SmartERP Lab. The conversion of this data will be handled later in the upgrade process.

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WHY UPGRADE TO 9.2?

- Improve User Productivity using Work Centers
- Incorporates hundreds of new features
- More self-service capabilities
- Activity Guides to enhance business processes
- Improvements in security and controls
- Identify problems quickly and act to minimize the impact

SMARTERP LAB ADVANTAGES:

LESS WORKLOAD ON YOUR RESOURCES

By using the SmartERP lab for upgrade, your involvement in the application upgrade process is minimized.

FASTER UPGRADES

We perform a major portion your upgrade in our lab on our own dedicated systems.

QUALITY ASSURANCE REVIEW

SmartERP team lead performs seven quality control checkpoints throughout the upgrade.

EASIER FUTURE UPGRADES

With best practices followed, SmartERP will make upgrades easier in the future.

EVALUATION

Upon receiving the database, SmartERP recreates the database. Next, compare reports are created comparing your database with a “vanilla” (unmodified) database at the same release as your current production environment. These compare reports are then analyzed by the SmartERP Lab staff in order to precisely determine the level of customization.

This evaluation is used to validate the scope of the upgrade and the time required to complete the upgrade in the SmartERP Lab. The evaluation is typically completed within five days of the schedule upgrade project start date.

For customers needing to understand what customizations were made to their application, the deliverables from this evaluation can serve as that much needed documentation. As a stand-alone offering this evaluation is a service that the SmartERP Lab can provide as a separate service.

COMPARE AND COPY

The process continues with the creation of the Full Compare Reports. First, the PeopleTools tables are brought up to the current release (PeopleTools Upgrade) in order to compare your database against the new release. The compare reports are then run and analyzed to identify any customizations that may be in conflict with functionality in the new release.

The goal of the SmartERP Lab is to provide you with all the added functionality in the new release, as well as carry forward as many of your customizations as possible. Potentially, customizations will exist which cannot be reapplied. These cases will be clearly documented in the Upgrade Notes document.

UPGRADE AND BE UP-TO-DATE

With the new PeopleSoft Feature Pack model from Oracle, when you perform an upgrade the amount by which you could be out-of-date has been reduced with respect to Maintenance Packs/Bundles. But even with this model, depending on the time you decide to start the upgrade, you can get out-of-date by multiple Maintenance Packs. Once a new upgrade release is generally available from Oracle, when issues are encountered they will typically require that you be on the latest patch levels which can make upgrading even more challenging. SmartERP has been very successful in the process of including the latest Maintenance Packs as part of the upgrade process. Hence your upgrade will get you truly up-to-date, reducing the overall cost of maintenance while leveraging the very latest features available.

PACKAGING

The final process in the SmartERP Lab is to repackage the database in preparation for the onsite delivery. A PeopleTools export is created and packaged along with the logs, scripts, and other deliverables generated during the technical upgrade. We package this on a CD and deliver it to you so that you have a complete account of your upgrade.

DELIVERY

To complete the SmartERP Lab's involvement in the upgrade, a consultant travels to your site to support your Test Move to Production. This process involves importing the upgraded PeopleTools tables into a Copy of the Production database. This is followed by running table creation scripts, table alter scripts, and index recreation scripts. Once that is completed, the data conversion scripts can be then executed to convert the data from the old release table structures to the new release table structures. Throughout this process, we will work directly with your resources so they gain the hands-on experience necessary to conduct subsequent Test Moves to Production as well as your Final Move to Production after the full testing cycles are complete.

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