Optim™

Enterprise Data Management
Strategies to Support
Upgrade & Migration Projects

Agenda

- **About Upgrades & Migrations**

- **Role of Enterprise Data Management**

- **Expected Capabilities and Benefits of Archiving Solutions**

- **How to Implement**

No part of this presentation may be reproduced or transmitted in any form by any means, electronic or mechanical, including photocopying and recording, for any purpose without the express written permission of Princeton Softech, Inc.

About Upgrades & Migrations

- **Why upgrade?**

  - Leverage new features for competitive advantage

  - Maintain vendor support

- **Why migrate?**

  - Upgrade path not technically feasible

  - Decommissioning obsolete or redundant system

  - Current application no longer aligned with business needs

What Drives Application Upgrades Today?

- **Forrester Research: "Replacing or upgrading applications is an important issue for many firms…with 18% ranking it as a critical priority"[1]**

  – Decision not to upgrade carries compliance and operational risks

- **Aberdeen: 74% of respondents opted to consolidate multiple ERP systems into a single corporate standard[2]**

  – Managing multiple applications or versions increases complexity and cost

1. Paul Hamerman, "Application Upgrades: When and Why," Forrester Tech Choices, 2006

2. Cindy Jutras, "Benchmarking ERP in Manufacturing," Aberdeen Group Presentation, 2006

What's the Problem? Risk and Cost

- **Risk**

  - Extended downtime; substantial business disruption

  - Data retention compliance; audit and discovery requests
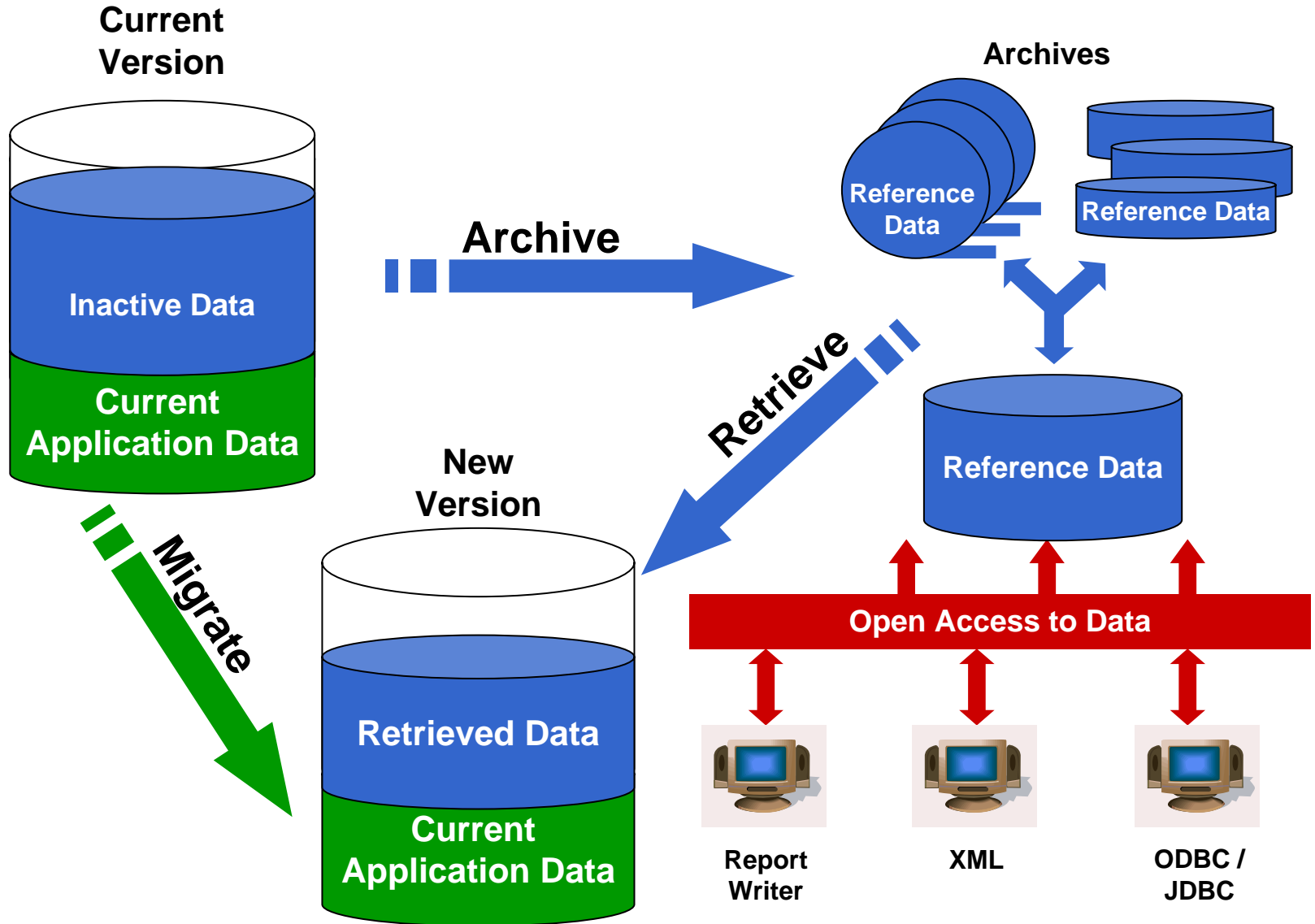
- **Cost**

  - Missed service targets, missed reporting deadlines

  - Key business processes not completed on time

  - Deferred revenue

  - Fines and penalties

  - Opportunity costs

The Market Need

- **Archive historical data from older application or database versions, and safely remove it to a secure archive.**

- **Preserve each archived business objects as an audit ready "snapshot in time"**

- **Reduce the amount of active application data to migrate to new version**
  - Speeds upgrade conversion run-time
  - Reduces risk of costly downtime

- **Maintain application-independent access to archived transactions**
  - Key consideration for sites that migrate or re-implement, rather than upgrade
  - Supports compliance initiatives
  - Enables rapid, accurate response to audit and discovery requests
  - For companies running Oracle, PeopleSoft and JDE apps, Optim provides a safe, secure path to Project Fusion

How An Archiving Solution Should Work

Current Version

Inactive Data

Current Application Data

Archives

Reference Data

Reference Data

Archive

Retrieve

Migrate

New Version

Retrieved Data

Current Application Data

Reference Data

Open Access to Data

Report Writer

XML

ODBC / JDBC

Access to Archives

- **Application-independent access to archives**
  - "Future-proof;" preserves business value of the data
  - Easily generate reports or respond to inquiries

- **Leverage industry standards and available tools**
  - ODBC/JDBC
  - XML
  - Any standard SQL-based tool
  - Report Writers (Cognos, Business Objects, Discoverer)

- **Retrieve archived data to current application version**
  - As required for additional business processing or complex queries
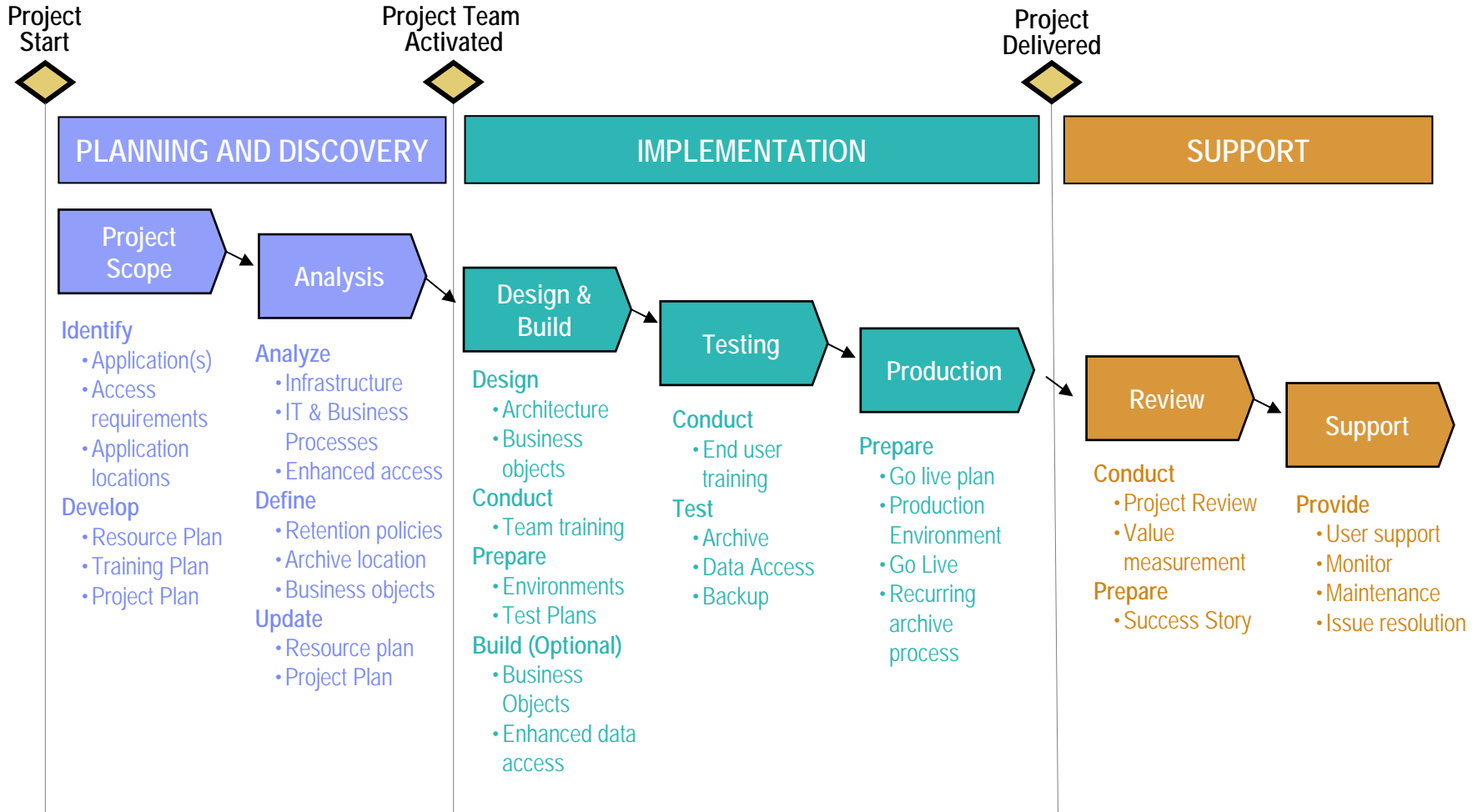
Benefits Summary

- **Speed the upgrade / migration conversion**
  - Minimize business disruption
  - Maintain revenue generation
  - Avoid service-related fines and penalties

- **Future-proof application deployment strategy**
  - Archived transactions are retained for the full retention period with access independent of the application version from which they were archived
  - Query and generate reports using industry standard methods and available tools

- **Sustain compliance proof and audit/discovery paths**
  - "Audit snapshot in time" provides complete business entities for unalterable recorded transactions

- **Additional benefits** – **improve performance, reduce risk, control costs**
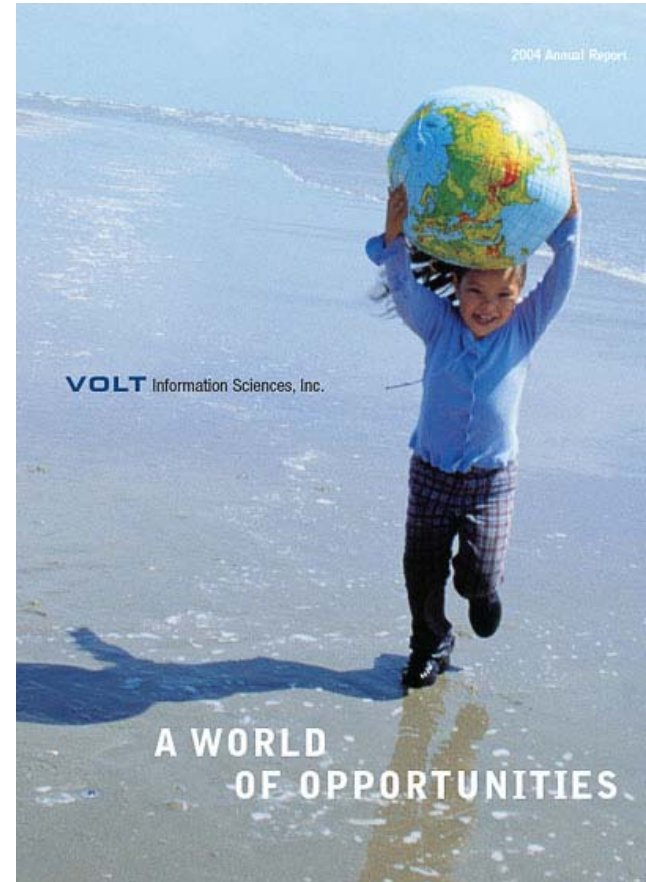
Solution Implementation

- **Define your business objectives for data management**

- **Apply processes and technology**

- **Implement a solution into your application environments**

Implementation Time Line

Project Start	Project Team Activated	Project Delivered

PLANNING AND DISCOVERY

IMPLEMENTATION

SUPPORT

Project Scope

Analysis

Identify
- Application(s)
- Access requirements
- Application locations

Develop
- Resource Plan
- Training Plan
- Project Plan

Analyze
- Infrastructure
- IT & Business Processes
- Enhanced access

Define
- Retention policies
- Archive location
- Business objects

Update
- Resource plan
- Project Plan

Design & Build

Testing

Production

Design
- Architecture
- Business objects

Conduct
- Team training

Prepare
- Environments
- Test Plans

Build (Optional)
- Business Objects
- Enhanced data access

Conduct
- End user training

Test
- Archive
- Data Access
- Backup

Prepare
- Go live plan
- Production Environment
- Go Live
- Recurring archive process

Review

Support

Conduct
- Project Review
- Value measurement

Prepare
- Success Story

Provide
- User support
- Monitor
- Maintenance
- Issue resolution

Example: VOLT Information Sciences

- **Volt Information Sciences, Inc. (www.volt.com)**

  – Leading provider of Staffing Services and Telecommunications and Information Solutions

  – Fortune 100 customer base

  – Worldwide network of over 300 branch offices

VOLT: Key Archiving Solution Requirements

- **Objective:** *Upgrade scripts to run in less than 50 hours*

- **Proven, out of the box solution with an excellent track record**

- **Archive templates pre-defined with PeopleSoft relationships**

  - General Ledger, Billing, A/R, A/P, Payroll, Asset Management, Vector (T/E), Projects

- **Ability to access historical data using existing programs.**

- **Minimize storage requirements by storing archives in compressed format**

- **Rapid implementation**

VOLT: Results

- *Upgrade run-time (7.5 to 8.4 Financials) reduced from 140 hours to 50 hours*

- **Quickly and safely archived financial transactions 3, 4 and 5 years old**
  - Now rolling archiving upon age and status events

- **Large volume archiving:**
  - General Ledger archive for 3 fiscal years
  - ~2 hr run time per fiscal yr; ~16 million rows archived.

- **500 GB PeopleSoft Financials 7.5 Oracle database reduced by 50%**

- **Key functional processes now running 25% to 300% faster**

Project Requirements

- **A single solution for managing enterprise application data throughout every stage of the information lifecycle**

- **Applies business rules and automates processes that govern how to assess, classify, archive, subset, access, store and protect enterprise application data**

- **Supports and scales across applications, databases, operating systems and hardware platforms**

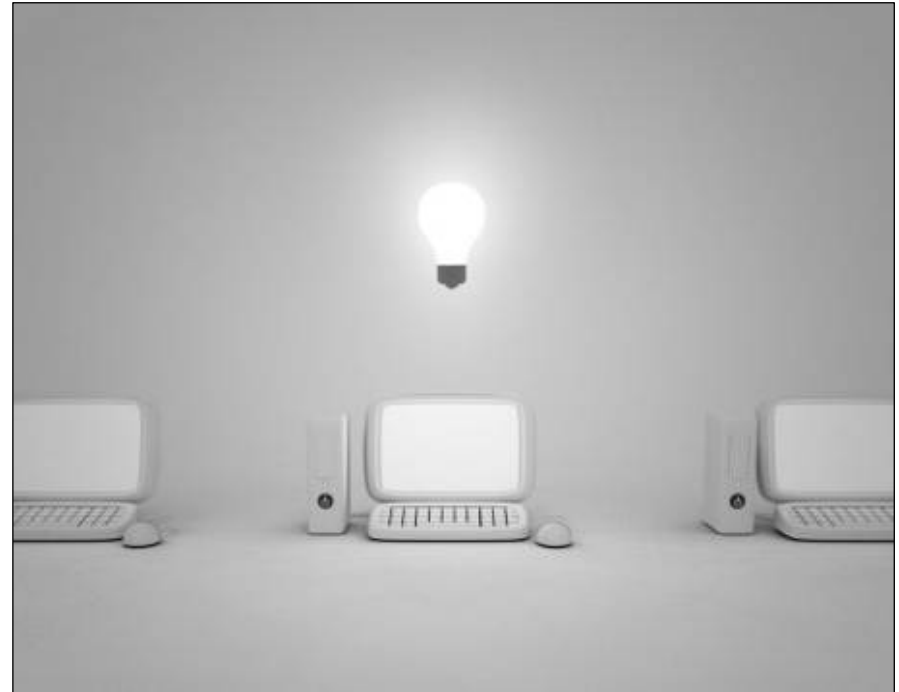- **Optimizes the business value of your IT infrastructure**

About 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

Solutions for Upgrades & Migrations

- **Optim**

- **Services for Upgrades & Migrations**

- **Enterprise Support**

  - Applications: Oracle E-Business, PeopleSoft, Siebel, JD Edwards, AmdocsCRM, custom, packaged and legacy applications

  - Databases: Oracle, SQL Server, Sybase, Informix, DB2

  - Platforms: Windows, Unix, Linux, z/OS

Summary

- **Upgrade and migration projects involve complexity, risk and cost**

- **Companies need to execute upgrade and migration projects quickly and successfully, while preserving access to data from prior versions**

- **Princeton Softech Optim provides a comprehensive solution**

  - Speed upgrades and migrations

  - Reduce cost and risk

  - Deliver project planning, execution and on-site support to facilitate upgrade and migration projects

QUESTIONS?

For further information:

Steve Johnston

johnstst@us.ibm.com