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

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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 standard²
  - Managing multiple applications or versions increases complexity and cost

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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

Migrate

Retrieve

New Version

Retrieved Data

Current Application Data

Open Access to Data

ODBC / JDBC

XML

Report Writer

Reference Data

Archives

Reference Data

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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

PLANNING AND DISCOVERY

- Project Scope
  - Identify
    - Application(s)
    - Access requirements
    - Application locations
  - Develop
    - Resource Plan
    - Training Plan
    - Project Plan
  - Update
    - Resource plan
    - Project Plan

- Analysis
  - Analyze
    - Infrastructure
    - IT & Business Processes
    - Enhanced access
  - Define
    - Retention policies
    - Archive location
    - Business objects

IMPLEMENTATION

- Design & Build
  - Design
    - Architecture
    - Business objects
  - Conduct
    - Team training
  - Prepare
    - Environments
    - Test Plans
  - Build (Optional)
    - Business Objects
    - Enhanced data access

- Testing
  - Conduct
    - End user training
    - Test
      - Archive
      - Data Access
      - Backup

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

SUPPORT

- Review
  - Conduct
    - Project Review
    - Value measurement
  - Prepare
    - Success Story
- Support
  - Provide
    - User support
    - Monitor
    - Maintenance
    - Issue resolution
Example: VOLT Information Sciences

- Volt Information Sciences, Inc. ([www.volt.com](http://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:

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