

The Client:

Undisclosed State-Local Government Agency

Business Need:

Client is a local government with an estimated population of half a million. With a total revenue of almost \$300B, the client is the home for five Fortune 500 companies.

Client implemented new Enterprise Resource Planning product in 2008. While still operational, it was lacking much of the newer functionality in later releases and the client wanted to be on a fully supported version. In early 2014, the client was looking to upgrade its PeopleSoft software to version 9.2 for their FIN, HCM, and ELM applications, as well as move to a new data center to cloud.

The upgrade was a collaborative effort between Finance & Property Services (FPS), Human Resources (HR) and Information Technology (IT) departments. It was part of an overall Enterprise Resource Planning (ERP) program including an Oracle DB 11g Upgrade, HR Upgrade (requiring a critical HR Payroll to Financials interface), and a new ERP Data Warehouse and Analytics Reporting System.

Our Role:

Project Management, Change Management and Product Expertise during Assessment, RFP creation, Vendor Selection, Manage PeopleSoft Upgrade, Data Warehouse Implementation/Integration and Datacenter migration to cloud.

Project Objectives:

- ✓ Review for areas of Automation.
- ✓ Increase Knowledge of PeopleSoft Capabilities.
- ✓ Build an application and feature set roadmap.
- ✓ Prepare for upgrade.
- ✓ Manage FSCM upgrade, optimization of HCM, Data Warehouse Integration and Datacenter Migration.

Our Solution:

The client selected the iLynx Team to first review current state and develop a high level future state roadmap and implementation plan. The current state analysis was assessed based on pain points, best practices, market trends, new features / functions, analytics, automation, and industry benchmarks.

New Module/Software Reviews included OSN, Vinimaya Marketplace, SCM Portal Pack, eCatalog, supplier contracts, eSupplier connect, strategic sourcing, Oracle OBIEE. The technology review included reviewing customizations and system performance.

iLynx upgrade methodology included following key recommendations:

Simplify your Environment:

- ✓ Review customizations early and determine what can be replaced with new functionalities. The rise of work centers, fluid and classic plus pages, delivered reconciliation tools and configurable page definitions, the need for typical customizations are far less than they used to be.
- ✓ Review opportunity to clean up if a customization cannot be removed or consider creating a bolt on to replace it with.
- ✓ Review reporting strategy, consider analytics, and rethink existing crystal reports since Business Intelligence (BI) publisher will replace it.
- ✓ Reconsider security and performance since tools such as SSO will be supported after April 2018 and Elastic Search became the new indexing tool in 8.55/8.56.

Rethink Testing and Maintenance Strategy:

- ✓ Install PeopleSoft Update Manager (PUM) which is required to upgrade to 9.2. With the flexibility to selectively apply new features, regulatory updates and patches, it is the best approach to become a proactive organization by setting up a maintenance strategy for the organization.
- ✓ Testing is known to consume about 50% of enterprise projects. Install delivered PTF – PeopleSoft Test Framework to record test plans and reduce future testing effort.
- ✓ iLynx has a custom tool that works with PTF, PUM, and process scheduler to automate testing and schedule updates. It reduces total testing effort significantly.

Review your Architecture:

- ✓ Cloud is here to stay and that is a fact. This is a great time to ask if Cloud is for you.
- ✓ If you are not ready for a Software as a Service (SaaS), can accepting an Infrastructure as a service (IaaS) downsize your workforce, secure your environment and reduce your cost?
- ✓ iLynx can assess your infrastructure need and can suggest cloud solutions along with enterprise staffing model to provide on-going support.

Flexible Mobile Use:

- ✓ Fluid User Interface delivered in 8.54, provides flexible and device independent application that gives a better user experience. It takes advantage of the latest development tools such as HTML 5.0, CSS 3.0 and Javascript. Instead of menu driven, it guides you through navigation and thru self-service.
- ✓ Classic page was built for power users and fluid UI is designed so anyone can configure. You do not have to be an expert.
- ✓ Fluid approval provides flexibility of approving transactions from mobile devices.
- ✓ Fluid is focused on users and it uses analytics using user query. So, consider system performance before deploying fluid.

Planning for the future:

- ✓ Autonomous Database introduced by Oracle in 2017 Open World Conference, Metal as a Service (MaaS) or Platform as a service (PaaS) should be considered prior to coming up with a future design of your Enterprise IT.
- ✓ It is ideal to plan a 3 to 5-year vision for the organization that details out how to stay current with technology, how staffing and training will be needed to support these technologies, and how to implement a support plan using both internal and external help.
- ✓ Plan for on-going support and pro-active approach for selective adoption to stay up to date with future releases. Oracle recommended approach 1) Major Release two times a year 2) Minor Releases four times a year.

Results:

An Integrated solution with PS FSCM and HCM 9.2, Maximo, new data warehouse and Hyperion with migrated PeopleSoft ecosystem to a private cloud.