PeopleSoft Upgrade – The Lab Approach and Why We Did It That Way

Alfa Insurance

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Agenda

- Alfa and our Upgrade Objectives
- Challenges and Partner Selection
- Planning and the Lab Approach
- Lessons Learned and Tips

Alfa is ...

- Regional Insurance Co. – Montgomery, AL
- Multiple Lines of P & C as well as Life - $1 B
- 2,700 employees – 400 locations
- DB2 v8 on z/OS 1.7
- PeopleSoft HR and Financials

HR Upgrade Objectives

- Maintain support for tax updates, etc
- Maximize support and extended support options
- Upgrade path to Fusion
- Stability for several years until informed decision regarding DB2 on z/OS and Fusion

Challenges

- Internal team supporting PeopleSoft as well as performing the upgrade
- Lack of knowledge in the new version that we are upgrading to … double upgrade!!
- Explosion of database tables in each new version … sizing, tuning, validation

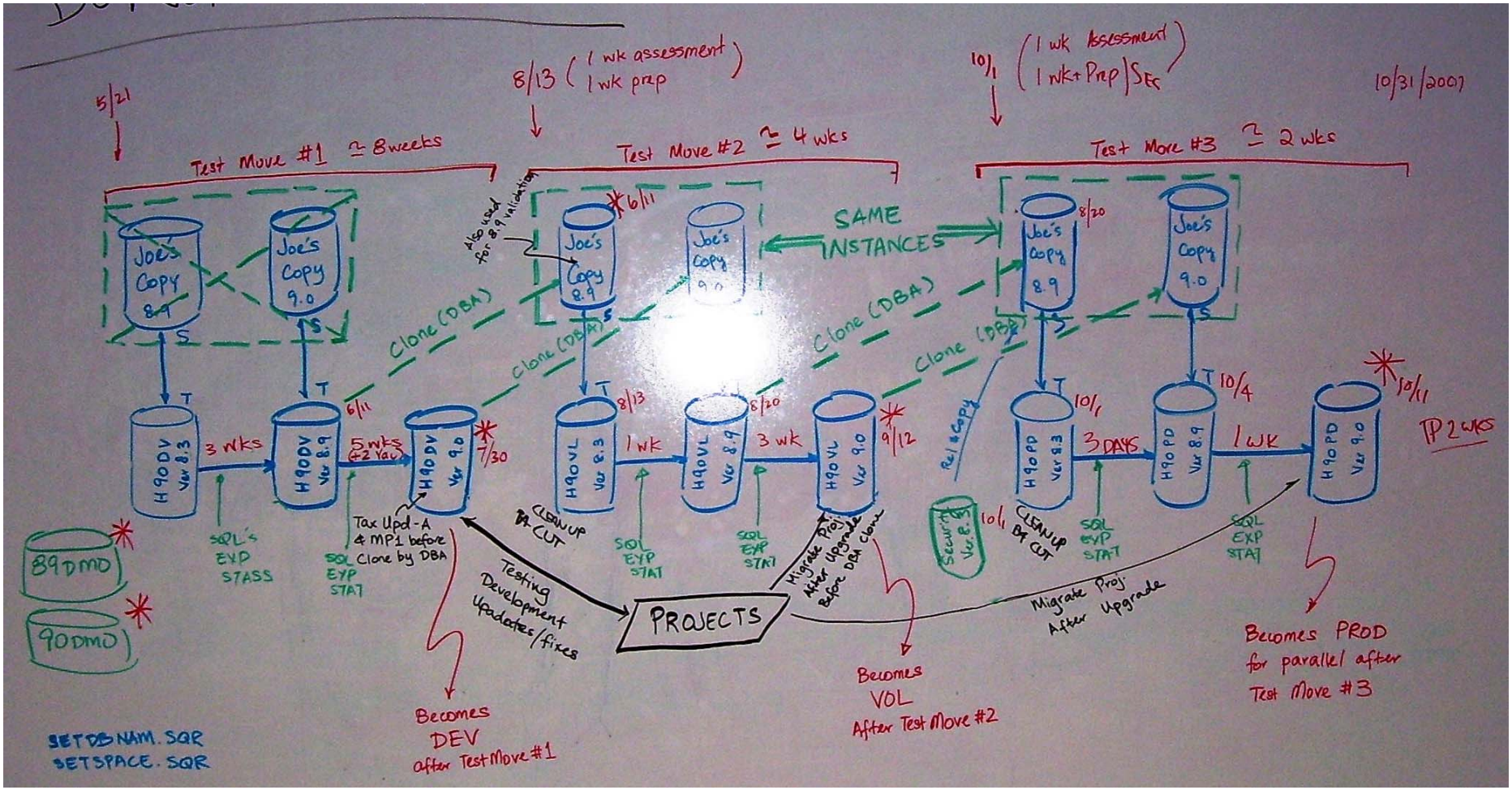
Partner Selection

- Start March 1 … Live by November 1, 2007
- Roles – Upgrader, DBA, Func Lead/PM
- Technical Knowledge for training us about more “under the covers” aspects
- Chose System Efficiency, Richmond, VA

Planning the Upgrade

- Multi-day session on site at Alfa
- Managers, developers, technicians, partner
- Understand the requirements of our double upgrade … “what if” DB2 scripts delayed
- Instances, servers, ongoing work, and security changes as we were upgrading

Upgrade Diagram



The Lab Approach

- Additional upgrade steps to perform
- Double data validation to address
- Increased risk with new upgrade scripts
- Overlap activities while we planned more
- We had to get started NOW !!

Remote Access Benefits

- VPN allowed upgrader to work remotely
- Flexibility to control expenses without jeopardizing schedule or quality
- Leveraged for an additional 7 weeks to offset additional project hours required
- Delivered October 15, 2007 … < 1% over $

DB2 Lessons Learned

- Apply maintenance to OS and DB before upgrade
- Understand rules and limitations of new versions of DB2
- Indexes delivered with DEFINE NO can cause problems (see previous point)
- Need to have < 1000 tables per tablespace on DB2 in non-DMO environments if using DSN1COPY

DB2 Lessons Learned

- Run SET programs more often to preserve customizations/modifications
- Back up with multiple methods of recovery to have flexibility in recovery options
- Exploit DASD utilities like SNAP or Flashcopy
- Segregate live environments in separate DB2 subsystems if using SNAP
- Buy a ZIP specialty engine to reduce contention for mainframe core MIPS with other systems

Upgrader Tips

- Do not apply patches (other than “Required For Upgrades”) to the databases before running conversion script as the App Engines do not account for any object changes in these patches
- DB2 – pay attention to STOGROUP parameters in the export and import scripts, this is in addition to tablespaces
- In a double upgrade, two source databases are needed. In the 1st database, bring all customizations forward, then spend time on 2nd database compare

Upgrader Tips

- Security – allocate at least 25% of project time for application, design and implementation
- During testing and/or go-live troubleshooting, 90% of issues and “bugs” are security related, that is where all troubleshooting should start
- Combine all post upgrade patches/bundles into one big project (as opposed to individual projects) and apply that project to database after Test Moves

Conclusion

- We have performed three upgrades, two on HR and one on Financials
- On both HR upgrades we used an almost identical “lab” approach
- We would not hesitate to do this again
- ***QUESTIONS …***