Papa John's PeopleSoft Upgrade
Supply Chain and Financials Success Story

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This document is a discussion of Papa John's upgrade process and experiences, specifically providing an overview of our approach, recommendations, and lessons learned. Additional focus will be given to the major structural and application changes in Order Management and Inventory starting in v8.9 and their impact on the upgrade.

An Overview Papa John's

Papa John's operates and franchises more than 3,000 pizza delivery restaurants worldwide. Located in Louisville, Kentucky, Papa John's is committed to its heritage established by its founder of making a superior-quality, traditional pizza. Papa John's operates ten distribution centers across the country utilizing PeopleSoft Supply Chain. In addition to its pizza delivery operations, Papa John's has also established a printing and promotions line of business.

Project Background

Papa John's implemented PeopleSoft Supply Chain and Financials v8.8 in 2005:

- Order Management
- Inventory
- Purchasing
- Billing
- General Ledger
- Accounts Payable
- Accounts Receivable
- Asset Management

Due to the lack of bundle and maintenance pack application since the implementation, Papa John's decided to upgrade to the next release as opposed to updating their existing application. Analysis done between v8.9 and v9.0 and v8.9 selected to mitigate risk (more proven application). Papa John's also wanted to take advantage of implementing new hardware during the upgrade process. Zanett was selected as Papa John's solution partner.

Upgrade Solution

Early discussions were held and collaborative planning executed between Papa John's and Zanett to finalize scope. A preliminary work breakdown structure was created. Both Papa John's and Zanett project managers were involved the in planning process. Required resources were identified for both Papa John's and Zanett. Zanett began review of customization documentation and discussions with customization owners. A go-live date and six month timeline were established.

The project team was organized as follows:

- Papa Johns
    - PMO Project Manager
    - Functional Area Activity Managers (Financials and SCM)
    - Three Customization Developers
    - One System Administrator / One DBA
    - Functional Users (System and User Acceptance Testing)

- Zanett
    - Project Manager / Technical Manager (50%)
    - Technical Upgrade Consultant (100%)
    - Functional Consultant (50% until System Testing)
    - Two Customization Developers (100% Development Period)

In order to prevent scope creep that may have impacted the timeline, the following guiding principles were established:

- No new customizations (production support issues were included and needed to be managed)
- No new functionality was included unless it was required by the upgrade

Additionally, the following project guidelines were established:

- Utilization of Quest STAT for change management
- Queries / nVision reports reviewed and updated by end users (completed in development and migrated with other customizations)
- All upgrade work was completed on new hardware

A collaborative project management approach was established between Papa John's and Zanett. Project management roles and tasks were clearly defined as part of the initial planning process and work breakdown structure creation. Papa John's project manager was responsible for project coordination, management of Papa John's resources from a testing process perspective, and provided upper management communication. The Zanett project manager was able to focus on the technology aspects of the projects. The technology resources were managed by the Zanett project manager. Additional responsibilities of the Zanett project manager include the completion of functional tasks and the management of the customization reapplication process.

Below is the high level timeline that was established for the project:
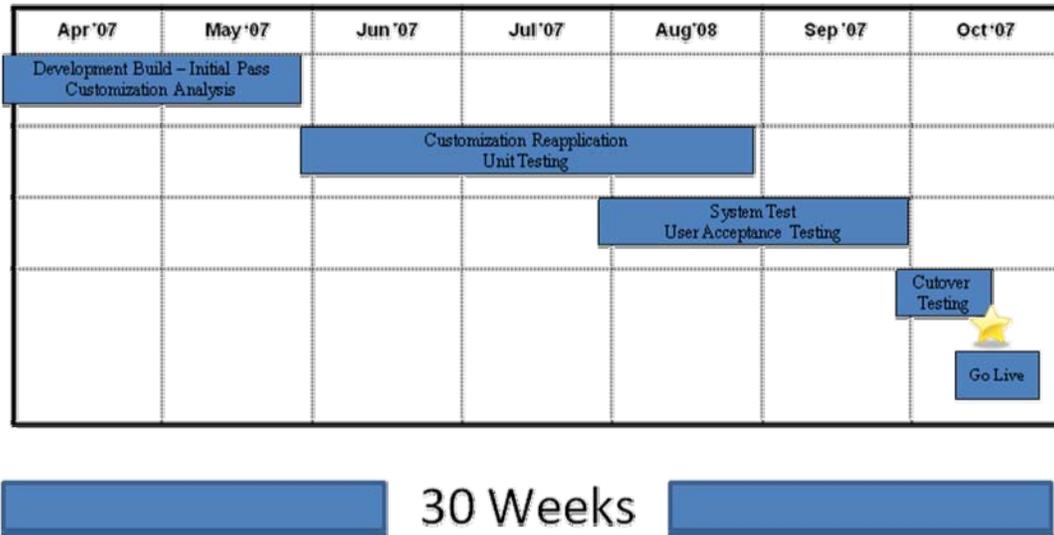
The timeline highlights include the following:

- Initial pass to build development took approximately four weeks
- Customization reapplication process was iterative and continued through system testing
- Two testing cycles (system and user acceptance) were planned and needed
- Final three weeks spent completing move to production test cycles to finalize timings

The project team experienced a number of challenges throughout the course of the project. The first, being the number of customizations. Below is a chart that details the customizations by process areas.

PS Projects	Total	Eliminated	No Update	Update
SCM	59	15	16	28
FIN	90	17	46	27
Total	149	32	62	55
%	100%	21%	42%	37%

Additional challenges include the extensive application changes within the supply chain modules and related performance. It was required that development continued during the upgrade process. This needed to be managed along with the application of maintenance packs. The project team was also working towards a 48 hour cutover window. Below is a description of how each of these challenges was handled.

Due to number of customizations, system documentation, and knowledge of Papa John's users, the compare reports were not used for customization analysis. The customizations were well organized within the application. All projects were labeled with a beginning PJ and all custom or modified SQRs were in a custom directory. Additionally, Papa John's resources, both functional and technical were very knowledgeable on the customizations. The Zanett upgrade resource was able to extract the projects and related objects for analysis. During the analysis process, users were able to identify customizations and their use. Certain customizations were eliminated through

this process which mainly included unused reports and bug fixes in the prior release. Zanett functional resources and Papa John's developers completed initial unit testing. The updating process was managed by the Zanett project manager using an Excel spreadsheet for tracking purposes and Quest STAT for managing system changes.

PeopleSoft v8.9 had a major rewrite of the Inventory module. DEMAND_INF_INV, DEMAND_INV, and SHIP_INF_INV were consolidated to one table, IN_DEMAND. Additionally, fields from these three tables were eliminated. Specifically, the data fields are not date time fields. This rewrite also caused performance issues on the customizations that were reapplied. Numerous iterations of performance testing were required for these customizations. Other changes were made to Order Management, specifically buying agreements. On the supply side, the matching process was rewritten with changes to the configuration required and additional rules available. The required application changes also required a security review due to the numerous new pages created from these new processes.

It was required by Papa John's that the development process continued in v8.8. Although this development was kept to a minimum, it did need to be managed and incorporated into the v8.9 development process. New customizations were exported as part of the move to production testing process after the PeopleTools upgrade. They were then imported into the v8.9 development environment for unit testing and updating as required. This process continued through system testing and was completed before user acceptance testing.
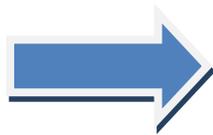
Risk the team was willing to accept

Maintenance pack application is always a challenge during any upgrade process. The team initially started with MP 5 and MP 6 for the first pass and creation of development. During the development process, a bug was identified that required MP 7 to fix it. MP 7 was applied and customizations were retested. This MP was then included in the move to production testing cycle. Later maintenance packs and bundles were applied to Demo and required fixes were extracted as needed. These fixes were mainly for landed cost processing.

## Analyze impact on development of MP application

Papa John's operates on a 24 / 7 schedule so it was not feasible for the system to be down for any length of time. The project team developed a plan that allows taking and shipping of store orders to continue while the system was "down" for the upgrade. This was tightly managed process by Papa John's end users. The orders taken during the down period where entered, shipped, and reconciled in the new version before any other transactions were entered. The time constraints required the supply chain conversion steps to be rewritten for performance on IN_DEMAND. The total processing time for this step was 20 hours during final cutover. Eleven moves to production including the final cutover were completed. This resulted in a 72 hours of straight processing without incident for the final cutover.

Practice makes perfect

Project Results

The project team executed on time and under budget project with a successful collaborative approach. Papa John's is experiencing strong return on investment due to great improvements in performance as well as the overall condition of PeopleSoft application and database. Papa John's has also implemented a release methodology for both maintenance packs and enhancements. The increased application performance has allowed Papa John's to embark on additional "optimization" projects for both Financials and Supply Chain. These include business process reviews and the implementation of new functionality.

Appropriate Planning → Collaborative Execution → Optimization
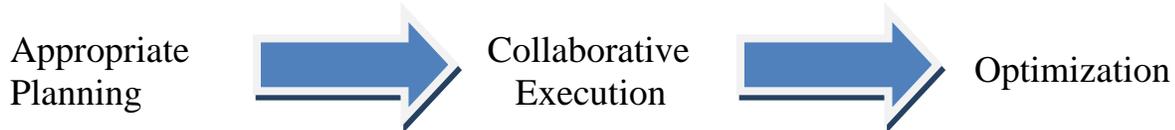
Lessons Learned

Papa John's approach made for a manageable project. The combination of early planning, a collaborative approach with Zanett, and how customizations had been managed since implementation drove a successful project. Strong project management and accountability from both organizations drove the timeline scope, tasks, and resource management. The users were heavily involved during system test and UAT. They are extremely familiar with the processes and customizations and were able to easily identify issues. The Papa John's development team was extremely knowledgeable and talented. Their assistance with troubleshooting, issue resolution, and development migration was the key to the success of the project.

Expect the need for a full time, DBA / upgrade resource whether it be an internal or external resource. The size of the database and cutover window should be considered during the planning process in estimating number of test moves required and expectations on performance of customizations. Maintenance should be applied and a process to manage additions to the baseline should be expected as the project progresses. The team / person responsible for security should be included in the project. Security was handled within project team as opposed to security personnel which caused issues post go-live.

Conclusion

The success of Papa John's v8.9 upgrade of their financials and supply chain is a tribute to all involved. It has allowed them to see performance gains as well as begin the process of implementing new functionality to improve their business processes. They also have been able to implement a maintenance pack release methodology that will allow them to stay up to date on patch application hence accomplishing the goals and objective of the upgrade itself.