

# Tips for Overcoming PeopleSoft Upgrade Challenges

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## Introduction

PeopleSoft provides several methods of upgrading your database. These methods will vary with your business needs and availability of resources. With each of these methods there are advantages and disadvantages, we will explore those as well as discuss the method of a double upgrade. The double upgrade incorporates many methods thus allowing for open discussion on most of these methods.

## Flexibility via Layers

PeopleSoft is a multi-layer application, this multi-layer technology allows for flexibility in the upgrade process. The greatest flexibility came to the application with the release of PeopleTools 8.44 and above. These layers consist of the database, PeopleTools, and PeopleSoft Application Layers. With these layers you may upgrade any individual layer without impacting the other layers.

## Upgrade Strategies

Within the upgrade methods of choice the one we are most familiar with is upgrade. This consists of doing everything at once; you upgrade the database, PeopleTools, and the PeopleSoft application all at the same time. Impact with this method to the business the greatest since both the technology and the business process are changing at the same time.

PeopleTools upgrades are sometime performed behind the scenes and depending on the change in technology may have gone unnoticed by the end user community. This is usually the least disruptive to the business, but most of the time impacts interfaces and the underlining technology stack.

Application upgrades impact business process but may not require any reconfiguration by the technology team. Reasons for performing an application only upgrade vary but are usually performed to gain some added benefit of the packaged software and to avoid a customization.

Double upgrades these are usually the most challenging but can be accomplished very successfully. The goal is always to upgrade on your first step to your final release of PeopleTools if possible. Since the PeopleTools will be at your final release you will then be able to perform an application only upgrade which is much simpler and faster as you second step in the process.

Onsite upgrades utilize your equipment and resources to perform the upgrade. This method allows for knowledge transfer to your organization and retains your intellectual property within your organization.

Offsite upgrades partially utilize your resources to perform the upgrade. Actually just the test upgrades utilize the client resources the initial upgrade is performed in the lab. This is a good first pass to determine syntax issues and that all upgrade steps complete successfully it will not upgrade your data. After the initial upgrade several test upgrades will need to be run against client data to produce a successful upgrade of the PeopleSoft application.

## **Upgrade Conclusion**

The upgrade decision needs to be based on your organizational goals and understanding of the business needs. Not all upgrades are right for all organizations but with proper analysis your organization should find that the upgrade process need not be as overwhelming today as in the past. The new tools at your disposal and allow your business either take one big leap or nibble away until you have the desired results in either case the upgrade process is proven and provides your organization with flexibility to stay on the cutting edge of technology and business processes to meet its needs.