# Papa John's PeopleSoft Upgrade

Supply Chain and Financials Success Story

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PIZZA
PAPA JOHN'S

zanett

# Abstract/Executive Summary

- Discussion of our 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.

# Authors/Presenters

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# Agenda

- Papa John's Overview

- Project Background

- Upgrade Solution

- Project Results

- Lessons Learned

- Q&A

# Papa John's Overview

- 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
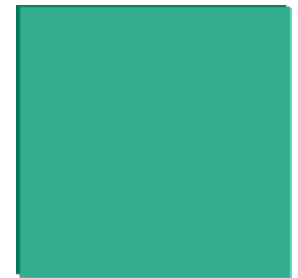
# Project Background

- 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

# Project Background (cont)

- 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

# Zanett Overview

- Full-lifecycle Oracle-related services provider – we help organizations **plan, build,** and **manage** their IT investment
- $50M in revenue, 200+ delivery professionals
- Over 300 successfully completed projects
- Nasdaq: ZANE

# Upgrade Solution Planning

- Discussions and collaborative planning between Papa John's and Zanett to finalize scope

- Creation of preliminary work breakdown structure

- Involvement of both Papa John's and Zanett project managers in planning process

# Upgrade Solution Planning (cont)

- Identification of required resources for both Papa John's and Zanett

- Began review of customization documentation and discussions with customization owners

- Go-live date and six month timeline established

# Project Organization

- 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)
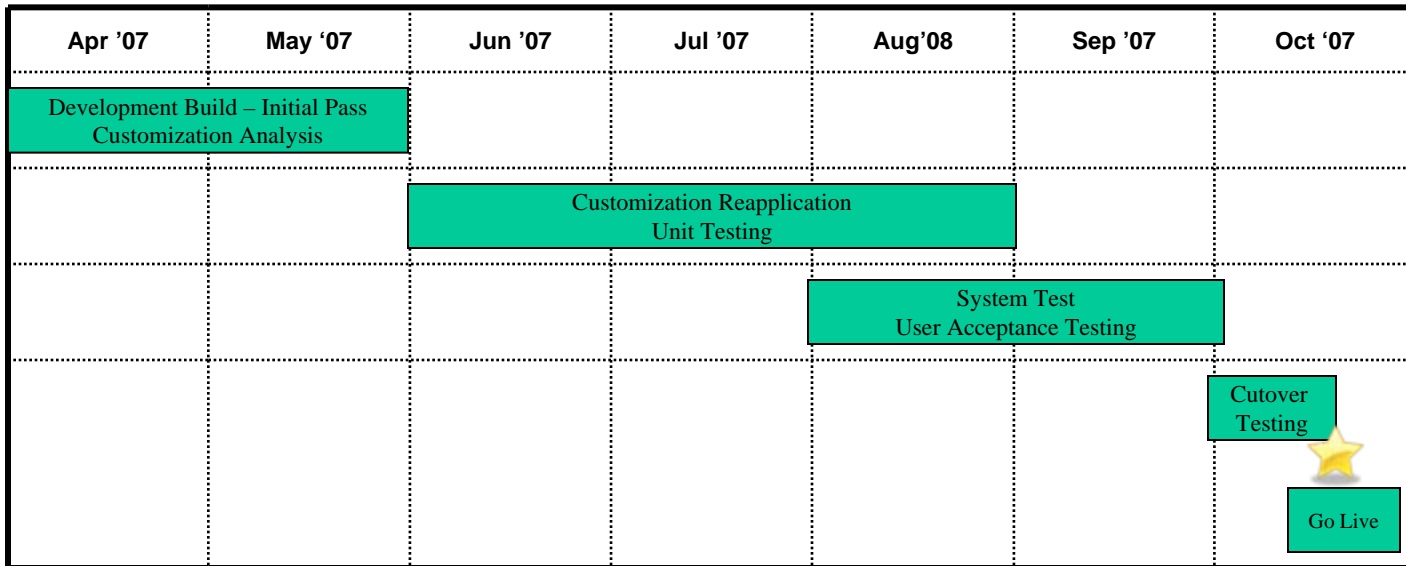
# Upgrade Guiding Principles

- 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
- 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

# Project Management Approach

- Collaborative project management approach
  - Papa John's Project Manager
    - Executed project coordination
    - Managed Papa John's resources (testing process)
    - Provided upper management communication
  - Zanett Project Manager
    - More technology focused
    - Managed technology resources (Papa John's and Zanett)
    - Completed functional tasks
    - Managed customization reapplication process

# Project Timeline

| Apr '07 | May '07 | Jun '07 | Jul '07 | Aug'08 | Sep '07 | Oct '07 |
|---------|---------|---------|---------|--------|---------|---------|
| Development Build – Initial Pass Customization Analysis | | | | | | |
| | | Customization Reapplication Unit Testing | | | | |
| | | | | System Test User Acceptance Testing | | |
| | | | | | | Cutover Testing |
| | | | | | | Go Live |

30 Weeks

# Timeline Highlights

- 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

# Challenges

- Number of customizations

| 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% |

- Extensive application changes within supply chain modules and related performance
- Continued development management (kept to a minimum)
- Maintenance pack management
- Cutover window – goal was 48 hours

# Customization Approach

- Due to number of customizations, system documentation, and knowledge of Papa John's users, compare reports were not used for customization analysis
  - Customizations were well organized within application
    - Projects were labeled with beginning PJ
    - Custom / modified SQRs were in a custom directory
  - Papa John's was very knowledgeable on the customizations
- Zanett upgrade resource was able to extract projects and related objects for analysis

# Customization Approach (cont)

- Users were able to identify customizations and their use
- Certain customizations were eliminated through this process (mostly reports and bug fixes in prior release)
- Zanett functional resources / Papa John's developers completed initial unit testing
- Updating process was managed using an Excel spreadsheet for tracking purposes and Quest STAT for managing system changes

# Application Changes – SCM

- Consolidation of DEMAND_INF_INV, DEMAND_INV, and SHIP_INF_INV to IN_DEMAND
  - Elimination of fields from the three tables listed above (specifically date fields are now date time fields)
  - Performance of customizations on new table
- Several changes in Order Management (specifically buying agreements)
- Matching process is rewritten with changes to the configuration and additional rules available
- Security impacts of the above changes (all new pages)

# Development Management

- Continued to apply bug fixes and high priority customizations to production
- Customizations were exported as part of the move to production testing and imported to the development environment for unit testing and updating as required
- Continued through system testing
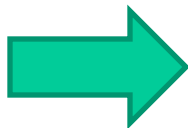
Risk team was willing to accept

# Maintenance Pack Management

- Always a challenge during any upgrade process
- Initially started with MP 5 and 6 for first pass
- During development process, MP 7 was required for a bug fix
- Later maintenance packs / bundles were applied to Demo and required fixes were extracted as needed (mainly for Landed Cost processing)
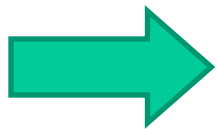
Analyze impact on development of MP application

# Cutover Window Approach

- Papa John's operates 24 / 7 so it was not feasible for the system to be down for any length of time
- Developed a plan for operations to continue while upgrade was in process (receiving and shipping store orders only)
- SCM conversion steps were rewritten for performance on IN_DEMAND (20 hours final)
- Completed 11 moves to production including the final cutover
- Final cutover resulted in 72 hours of straight processing without incident
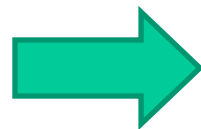
Practice makes perfect

# Project Results

- Executed on time and under budget project with a successful collaborative approach
- Experiencing strong return on investment due to great improvements in performance as well as the overall condition of PeopleSoft application and database
- Implementing a release methodology (enhancements and MPs)
- Able to embark on additional "optimization" projects for both Financials and Supply Chain
  - Process reviews
  - Implementation of new functionality

Appropriate Planning → Collaborative Execution → Optimization

# Lessons Learned

*The Good…*

- Papa John's approach made for a manageable project
    - Early planning, collaborative approach, customizations
- Strong project management and accountability
    - Timeline, scope, tasks, resource management
- Heavy involvement by end users during system test and UAT
    - They know processes best and were able to easily identify issues
- Extremely knowledgeable and talented Papa John's developers
    - Troubleshooting, issue resolution, development migration

# Lessons Learned

*The Bad And The Ugly…*

- Expect the need for a full time, DBA / upgrade resource (internal or external)
  - Size of database and cutover window should be considered during planning process in estimating number of test moves required and expectations on performance of customizations
- Apply the maintenance packs
  - Need to manage advantages of applying additional bundles / MP as the project progresses
- Include production security personnel in process
  - Security handled within project team as opposed to security personnel which caused issues post go-live

# End Result

# Q&A

- **Questions?**
  - Leave a business card if you want an email of the presentation or whitepaper
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