THE ERA OF CO-EXISTENCE:

A PEOPLESOFT AND CLOUD CASE STUDY

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INTRODUCTION

Eire recently partners with a Public Utilities client based in the mid-west that serves more than 800,000 people in the region. This company employs over 1800 employees, with almost half a million customers relying on them for utility services.

IT'S TIME FOR AN UPGRADE

As so many people depend on this Corporation for utilities, an essential element of daily life, it's important that the organization maintains a dependable and adaptable software system to manage resources. So, in early January 2021 the Utilities Provider enlisted Elire to upgrade their PeopleSoft Financials application from 9.1 to 9.2. This project required fine-tuned collaboration and communication across both teams in order to succeed.
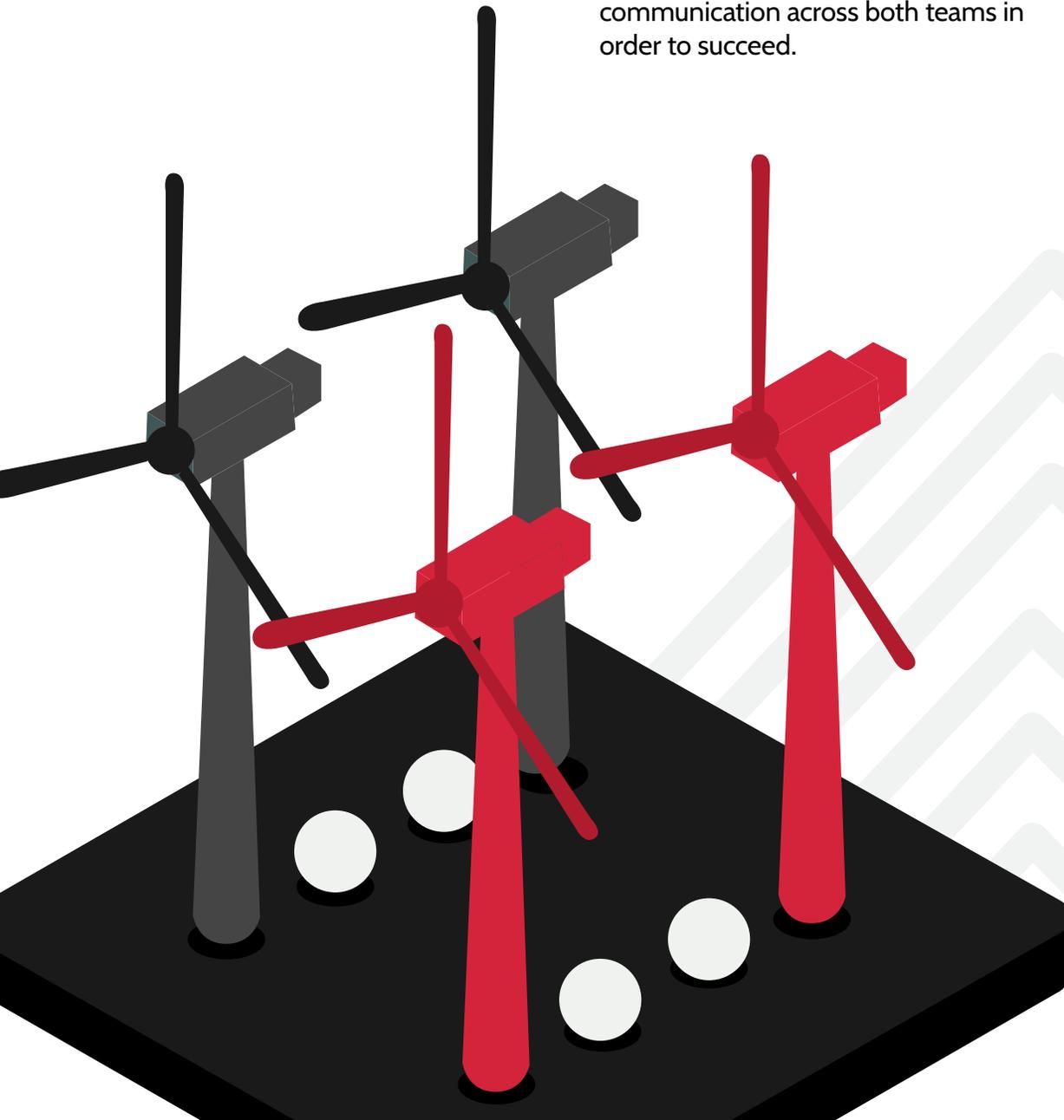
PHASE 1: PLAN OF ACTION

The Elire team executed the Utility Company's PeopleSoft 9.2 Upgrade in two phases, the first of which was Phase 1 - Fit Gap Assessment. In Elire's Upgrade framework, Fit Gap Assessment means laying out a Plan of Action and defining project scope. This step is essential for customers to appropriately gauge the time, resources, and system changes a project requires.

Kicking off Phase 1, Elire utilized the proprietary Scope Object Tracker Accelerator Tool to better understand the corporations current state customizations and assess their current state readiness for a 9.2 upgrade. As Elire and the Utilities Supplier dug into all the necessary steps for transitioning from 9.1 to 9.2, they realized removing customizations and getting back to a clean software state would be the biggest undertaking.

Unfortunately, the 9.1 system the Utility Company operated collected years of inefficient and rigid customizations that continuously lead to IT support problems. For many 9.2 Upgraders, removing these customizations and starting fresh can feel daunting, but adaptation is necessary.

Kicking off Phase 1, the first step Elire took was a customization review by running a tool that identifies customizations within a system. The Elire Team then facilitated workshops to review the company's customizations and demonstrated delivered functionality available to replace or reengineer these customizations.

Once Elire successfully identified all the organization's PeopleSoft customizations, they worked to fine-tune project recommendations by closely estimating how much time and effort would be required. Once a solid recommendation was achieved, it was time for the Client to decide if the Upgrade roadmap was right for them. Luckily, the company was fully on board with Phase 1 and scope was locked in – Elire had their plan of action.
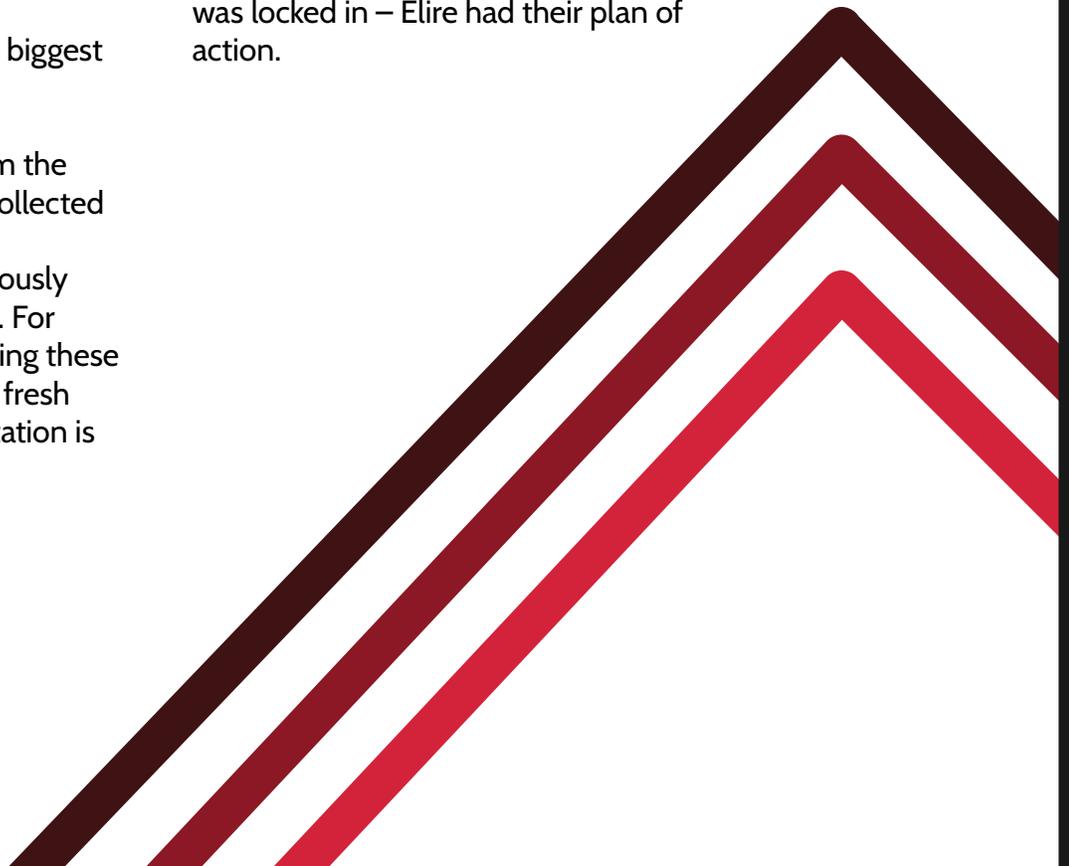
PHASE 2: PROJECT EXECUTION

As Elire and the Utilities Company entered Phase 2 – Project Execution, the goal was to upgrade to PeopleSoft Financials 9.2 and take advantage of the new features. The Elire Team aimed to replace invasive customizations and minimize the impact by utilizing new PeopleTools configuration capabilities. Elire also looked to enhance the company's current integrations by utilizing web services.

In order to achieve these goals, Elire deployed over eight expert resources, including a part-time upgrader, part-time project manager, technical development lead, part-time security lead, PeopleSoft Test Framework lead, change management trainer, and two functional leads. Elire's resources worked hands-on and interconnected with the organization's resources to make sure all project needs were met.

While undertaking Phase 2, Elire and the Utilities Provider faced challenges understanding team resources surrounding complex customizations. In turn, Elire and the Client struggled to collaborate and communicate how these customizations impacted key Project Costing, Program Management, Asset Management, and related to downstream processes and integrations. However, through in-depth communication and team-wide collaboration, Elire and the Public Utilities Provider began removing customizations and pushing the project forward.

Once the baseline requirements were better understood by the project team members, the removal or reengineering of invasive customizations became the common goal. By eliminating inefficient customizations, the Elire Team was able to successfully upgrade the corporation from PeopleSoft 9.1 to PeopleSoft 9.2. Not only did Elire effectively manage the complexities of the Utility Provider's customizations and business processes to ensure a smooth transition to PeopleSoft 9.2, but the project was also completed under budget.

Elire's work empowered the organization to fully leverage their new PeopleSoft technology and create a standardized approach for future integration. By successfully ushering the corporation back to a clean and concise PeopleSoft system, they now have the freedom and flexibility to prepare for future integrations, take on new functionality during PUM updates, and entertain the possibility of transitioning from PeopleSoft to Cloud.

PATH TO CLOUD: CLOUD EPM IMPLEMENTATION

The successful PeopleSoft 9.2 implementation of Elire's Public Utilities Client set the organization up perfectly to try a new Cloud Enterprise Performance Management (EPM) system, without requiring the transfer of their entire PeopleSoft environment. With stability across their on-premise applications, in December 2022 the company opted to implement Cloud EPM in conjunction with their current PeopleSoft ERP system.

There are many benefits to operating a hybrid system model, including quicker and easier knowledge and platform transitions due to smaller user groups. The Utilities Company utilized the Cloud EPM integration as a testing ground; a way to access and regularly update their data without requiring a large-scale transition of their entire PeopleSoft environment.

In integrating EPM to ERP, the organization sought the ability to connect their on-premise PeopleSoft General Ledger and generic data warehouses. Elire was tasked with facilitating the integration of EPM via an integration agent that can be extended with scripting to provide connectivity to non-standard data sources, 3rd party data sources, as well as other cloud applications.

Although the project seemed straight forward, Elire faced some challenges during the Cloud EPM integration. The organization's data security and confidentiality requirements prevented Elire from accessing their full data set, and in turn, the Elire Team had to provide scripts/calcs to the corporation's technical teams in order to facilitate the data cleansing.

Additionally, when challenges arose surrounding the Utility Company's infrastructure, Elire created step-by-step guides for their internal on-prem resources to perform tasks such as metadata/data extraction and automation testing. This tedious testing process required constant back-and-forth communication between teams in order to create successful scripts. Although the process required meticulous and continuous adaptation, the Elire and Utilities Provider teams ultimately collaborated to complete the EPM integration on time and under budget.

BENEFITS TO COEXISTENCE

Although the organization chose to maintain their original PeopleSoft ERP Environment, the company benefitted from their new Cloud EPM system as it required far less internal IT support. As their new Cloud EPM system upgrades automatically and has no formal upgrade process, the organization's IT department found itself with greater team bandwidth and fewer manhours designated to recurring system upgrades.

Additionally, the Utilities Company saw increased profitability and reporting with their Cloud EPM system, and a newfound focus on data metrics and analytics now aids their organization in business decisions.

Ultimately, the organization saw improved forecasting and budgeting, and more aligned business functions across their Cloud EPM system and PeopleSoft applications.

As a business that keeps the lights on for so many Americans, it's only right that the Utilities Provider deploy a PeopleSoft and Cloud EPM strategy that meets their business needs and keeps operations running smoothly. The organization's hybrid system aids them daily in supplying citizens all across the Midwest with reliable power.
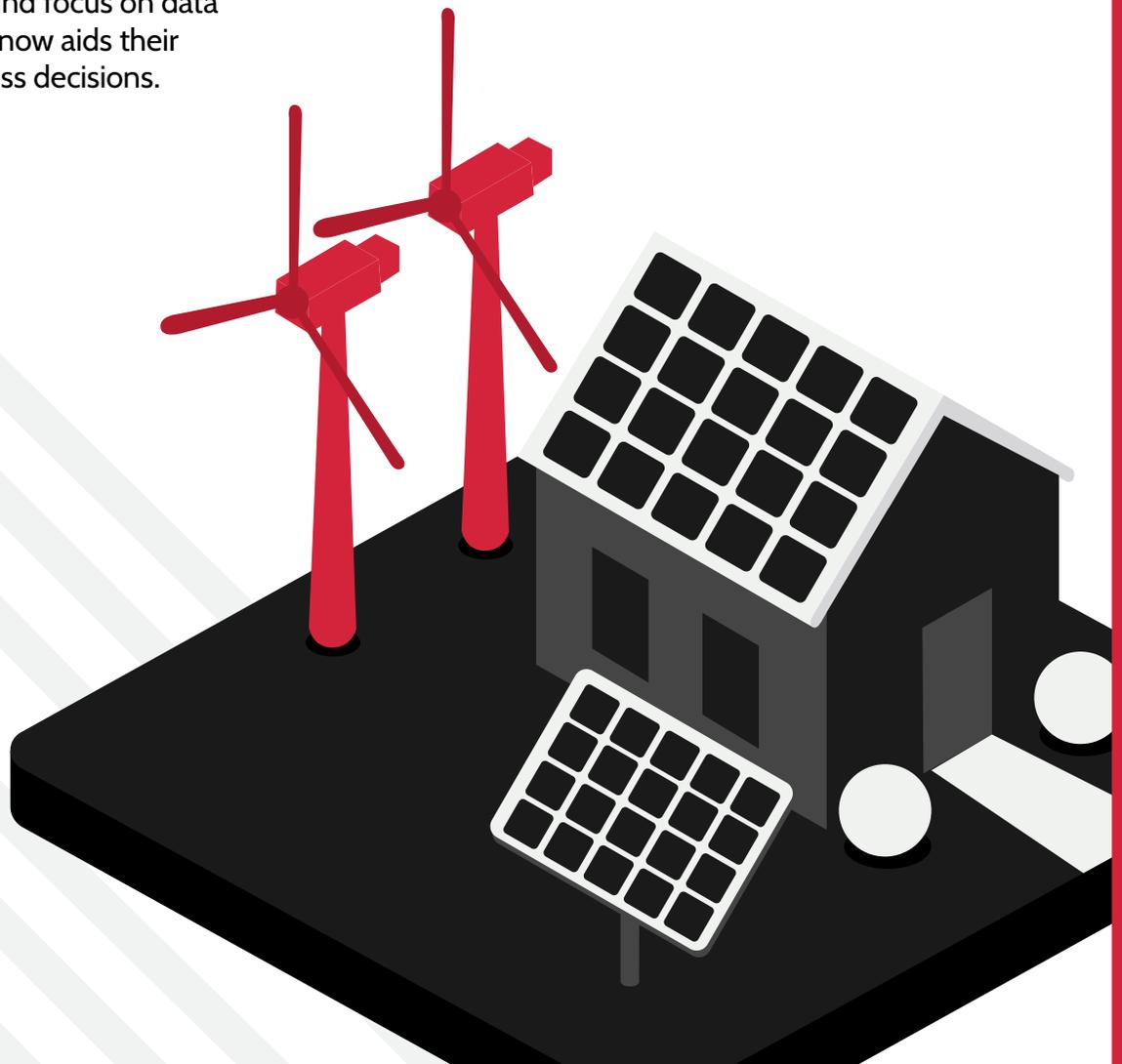
GET TO KNOW ELIRE

Elire Inc. is a trusted Oracle partner that offers software and IT consulting expertise in Treasury, PeopleSoft, Advisory, Cloud, and Managed Services. Elire specializes in assisting clients looking to transition from PeopleSoft to Cloud, whatever that may look like. The transition from PeopleSoft to Cloud is fluid and is different for everyone. Elire is here to help organizations wherever they may be on their path to Cloud.

To learn more about Elire's expert Path to Cloud services, check out the Elire **PeopleSoft to Cloud** webpage today. To speak with an Elire Expert about your PeopleSoft to Cloud journey, contact **ps2Cloud@Elire.com**. To stay up to date on all the latest developments in Oracle PeopleSoft and Cloud services, follow Elire on **LinkedIn** and **Twitter** to receive updates directly to your phone.

JEFF HILLIARD
On-Premise Center of Excellence Lead

Jeff Hilliard serves as Elire's On-Premise Center of Excellence Lead. Jeff has over 20 years of experience overseeing and conducting complex PeopleSoft technical upgrades. Additionally, Jeff oversaw and managed the Utility Corporation's PeopleSoft 9.2 Upgrade.

JASON MCCABE
Oracle Cloud ERP Practice Lead

Jason McCabe is the Oracle Cloud ERP Practice lead for Elire and is responsible for managing all clients using Oracle Cloud ERP Applications. Jason and his team deliver ERP solutions for clients looking to strategically align business strategy and organizational objectives through cloud-based application implementations.

JORDAN HUTCHCRAFT
Social Media & Digital Marketing Intern

Ms. Hutchcraft serves as Elire's Social Media and Digital Marketing Intern, working to develop and optimize marketing brand assets. Jordan collaborates with the Elire Marketing Team to produce blog and social media content, strategize for social media expansion, and maintain Elire's internal and external branding.