

## PeopleSoft V8 Upgrade Frequently Asked Questions

### 1. What is PeopleSoft?

PeopleSoft, along with SAP and Oracle, is among the world's top three software application providers, serving corporations, non-profits, government and education with integrated enterprise systems supporting human resources, financials, supply chain management, and customer relations. In the higher education market, PeopleSoft supports specialized applications in student administration and contributor relations in addition to core systems for financial management and HR.

### 2. What PeopleSoft products does Duke use and what functions do they support?

Duke is a licensed user of PeopleSoft's Student Administration System, which supports admissions, financial aid, registration, advising, and student billing and account management. Duke licensed the PeopleSoft Student Administration system in 1996 and was among the first universities to be "live" on all major modules in the summer of 2000. Currently there are about 900 licensed users of the PeopleSoft Student Administration system.

### 3. Why does PeopleSoft issue new, "upgrade" versions of its software?

Vendors provide new software releases for three primary reasons: 1) to consolidate the "fixes and patches" that are issued as needed to fix "bugs" during the life of a particular release; 2) to incorporate new functionality developed in conjunction with the client base; and 3) to make the underlying technical architecture more robust and efficient. One of the advantages of using vendor packages is that vendors deliver these periodic improvements, as part of the annual license fee, using large "industrial strength" development teams and drawing on a broad base of experience and "best practices" from among their installed user base. This process supports a long term process of continuous improvement in the software and the processes it can support. As vendors introduce a new generation of software, they end support of the preceding generation. PeopleSoft ends support for older software 24 months after the newer version becomes available.

### 4. Why should Duke upgrade its PeopleSoft software to V8?

In choosing a vendor-provided software solution, Duke both outsourced the process of software development, maintenance and improvement and entered a long term partnership with PeopleSoft and its other Student Administration customers to improve the software's features and strengthen its technical foundations. To take full advantage of our original investment and this ongoing

partnership, it is important to keep our software current and to participate actively in the product development process.

More specifically, we expect several immediate benefits from moving to V8: The new software, like all of the current generation of PeopleSoft systems, is fully deployed on the internet. This means that users will no longer have to install and maintain PeopleSoft software on their local PCs; instead, they can use any web browser from any PC to access the system based on their individual security profiles. For instance, departmental administrators will be able to maintain student advisors without installing PeopleSoft software on their own PCs, and recruiters will be able to access and update admissions data in the field.

5. What will the upgrade process entail?

We will approach the upgrade like an implementation project but on a smaller scale than our original implementation, when PeopleSoft was totally new to Duke. The heart of the upgrade is the technical task of updating our current PeopleSoft database to V8. The OIT PeopleSoft team will oversee this task, using the PeopleSoft Upgrade Lab and technical consultants, first creating a *test* database. Once the test database is created, we will devote considerable effort to testing critical processes in the test database. We will also train users in any process changes required by the upgrade and any new functionality Duke chooses to implement. When the testing is complete, the production database will be updated, and we will be “live” on PeopleSoft V8.

6. How will the upgrade affect users of the PeopleSoft system during the implementation process?

Most of the effort required for the upgrade will be provided by the SISS Office’s functional experts and the OIT technical support team. The database migration and testing will occur initially in a separate copy of the database and will not affect production activities except at the “go live” cutover point, which will require a system freeze of 2 to 3 days. The “go live” point will be timed to minimize impacts on Duke work processes. The earliest expected “go live” date is currently mid to late May, 2003, with several fallback dates thereafter.

Because our functional and technical staff resources will be concentrating on a successful upgrade, the time available for configuring new functionality in version 7.6, for developing new queries and reports, or for enhancing related ACES Web functionality will be strictly limited. Our project plan does assure adequate resources to support normal business operations during the upgrade process.

End users will be directly involved in the upgrade process in important ways.

First, we will designate “Upgrade Partners” in each of the major functional areas supported by PeopleSoft software to help the functional team test all major processes and identify process changes that need to be addressed through training or work process redesign. The Upgrade Partners will also assist in “delta training,” that is training other members of the Duke community in what has changed in the V8 software. All users of PeopleSoft software can expect to be involved in this delta training.

7. How will the upgrade affect end users after implementation?

After implementation, end users will access PeopleSoft via the internet, using Microsoft or Netscape web browsers. In some cases, panel layout and navigation will have changed in V8; these changes will be highlighted in the delta training. Because of the new internet architecture, more departmental users will have access to the PeopleSoft system, permitting more efficient management of advising, majors, and other departmental activities over time. Once the upgrade is completed, SISS staff resources will focus on enabling new functional capabilities delivered with the PeopleSoft software. For example, we expect to begin to develop PeopleSoft’s workflow capabilities to route transactions automatically from office to office; this would allow, for example, a withdrawal decision to automatically notify relevant offices and create a “work list” of necessary follow up items.

8. How will the PeopleSoft upgrade affect current web services?

ACES web (for students) and SISS web (for faculty and departmental staff) support functions that extend the capabilities of the core PeopleSoft system. As PeopleSoft’s capabilities expand over time, we will expect to move functional support from Duke-developed web capabilities to the core PeopleSoft system. We will determine as the upgrade process proceeds which functions can migrate from Duke-supported web services to PeopleSoft as part of the upgrade, which functions should be migrated after the upgrade, and which functions will need to be supported by Duke web services for the foreseeable future. In any event, current functionality will be preserved. Any new requests to develop additional functionality in ACES and SISS web services will be evaluated in the light of the availability of PeopleSoft V8 internet functionality.