



# *What to Expect Upgrading to Pega as-a-Service*

Seamless migration, proven success, and key milestones.

• eBook



# Table of contents

**01** Introduction

**04** Step 3 – Testing & Validation

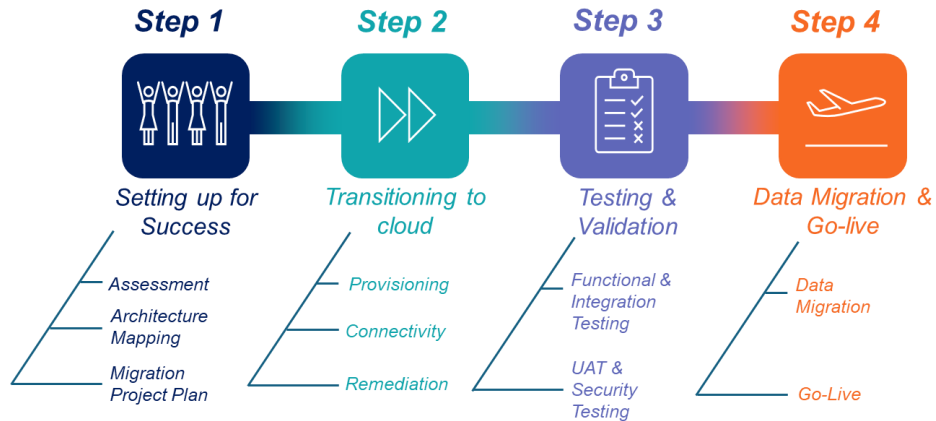
**02** Step 1 – Setting up for Success

**05** Step 4 – Data Migration and Go Live

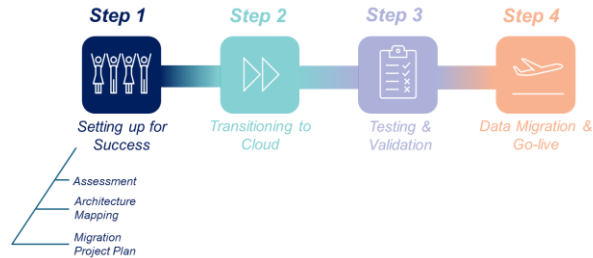
**03** Step 2 – Transitioning to Cloud

**06** Conclusion

You've decided to move to modern and upgrade to Pega-as-a-Service. Great! You're in good company with hundreds of other longtime Pega clients, and we've developed a streamlined migration approach that makes the process efficient and easy. This eBook outlines what you can expect and how Pega will guide you every step of the way.



# Step 1 – Setting up for Success



Before the migration, our experts work with you to assess how “cloud-ready” your applications are. We collaborate with you to ensure we have a full understanding of the existing application landscape, what integrations are in place, and other internal systems that need to connect to Pega. This helps us complete the migration rapidly. What’s more, the assessment is offered at ***no cost to you.***

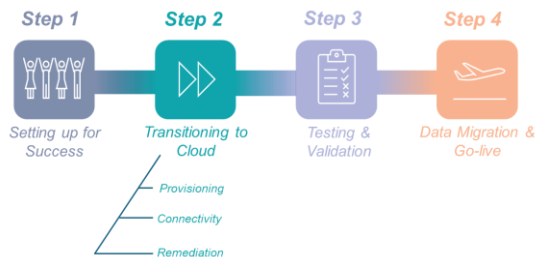
A critical artifact coming out of the assessment phase will be the Migration Project Plan, specific to your applications. Your Migration Project Plan will include an application remediation plan to address gaps or other changes uncovered during the assessment. Beyond “lift-and-shift”, we want our clients to have the best experience possible running in the Pega as a Service model – the Migration Project Plan will capture everything needed to ensure the ultimate Pega experience going forward.

## What this means for IT:

We look at things like initial Pega build version; custom database objects; integration methods used; and known customizations and technical debt to assess what’s needed to migrate your applications to Pega as a Service.



# Step 2 – Transitioning to Cloud



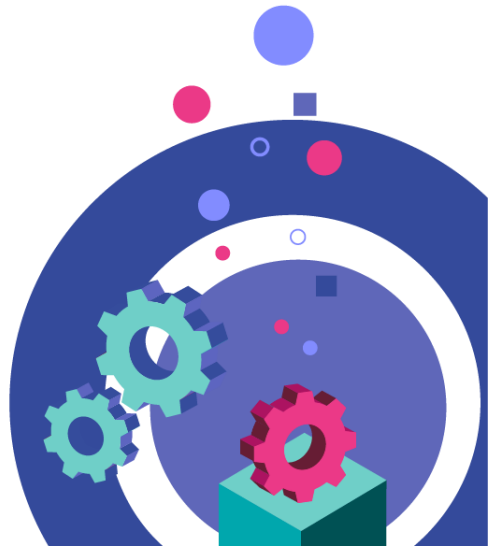
Now that in-scope applications have been assessed, a migration project plan has been defined, and a subscription agreement is in place, we can begin the cloud migration.

In this step, we'll bring online the Pega Cloud services that will support your migrated solutions. What we provision will be unique to you: all the services needed to run your workload(s) reliably, securely and at scale. We support both the public Internet as well as private connectivity options to your cloud services. Each organization is different, in terms of the connectivity methods and protocols they support, so we'll look to engage early with your networking team to determine the most appropriate connectivity setup for your Pega solution.

## What this means for IT:

The [connectivity options](#) available align with what our IaaS partners offer, which our clients generally use for their other cloud-based solutions. Our private connectivity options avoid traversing the public Internet, instead using a private, dedicated path between your network and Pega Cloud. Depending on your organization's internal networking policies and system integration requirements, we'll work with you to identify the connectivity method(s) best suited to your deployment.

From there, we'll copy your application to your isolated Pega Cloud service, on the current Pega release level. The next key task is application remediation. After your application has been migrated to Pega Cloud, you'll make the application changes to remediate any gaps or issues identified during the assessment (and detailed in your Migration Project Plan). For example, your application may have used stored procedures which should be remediated to reflect a more cloud-friendly approach (i.e. utilize a broadly accepted design approach not dependent on any one technology).



## Step 3 – Testing & Validation

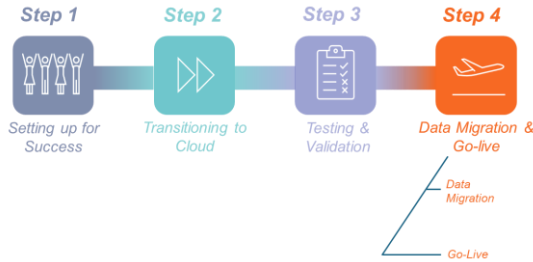


As you follow the Migration Project Plan, you'll begin testing your application in accordance with your testing strategy, utilizing your application rules and test data. Once your application is running correctly in your development environment, you'll use the Pega Deployment Manager Service (included with your Pega Cloud subscription) to promote your application to staging for further validation. Here you'll perform Functional Testing and end-to-end integration testing.

At this point, your application is on the cloud, connectivity has been established, your app is cloud-compatible and upgraded to the latest release of Pega, and testing has been completed. We're on to the final steps: data migration and go-live.

User Acceptance Testing is also common, to ensure users can successfully complete work and meet business objectives. Performing security testing is essential as well, including [vulnerability testing of your application running on Pega Cloud](#) to ensure compliance with your security standards.

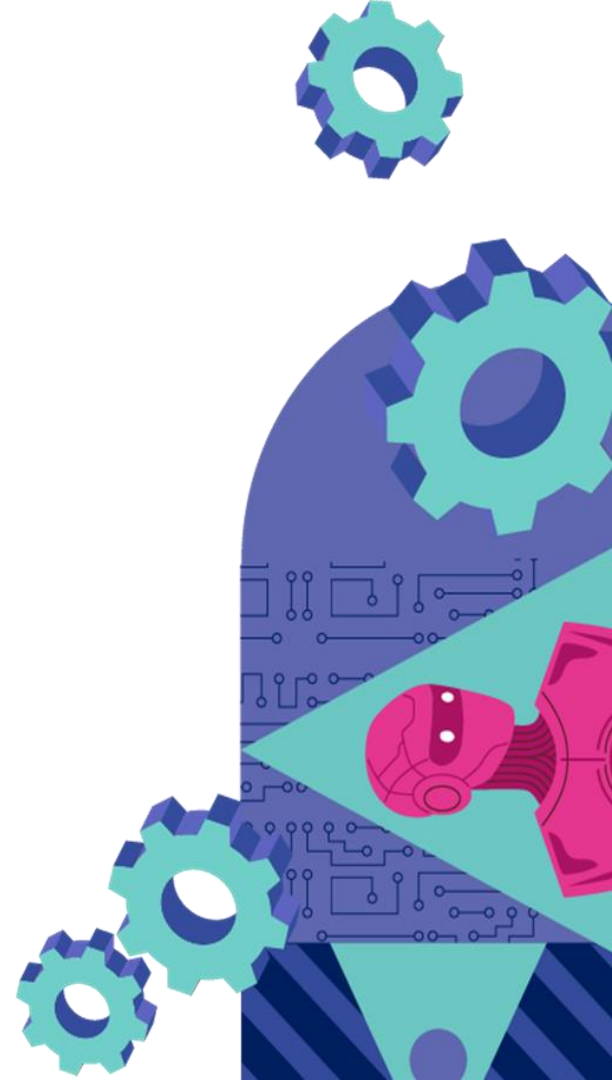
# Step 4 – Data Migration and Go Live



Pega has tooling to migrate your data to Pega Cloud. We collaborate with you to configure, test and dry-run the data migration process to develop a Production Cutover Runbook that captures, among other things, total time to complete as we prepare for go-live.

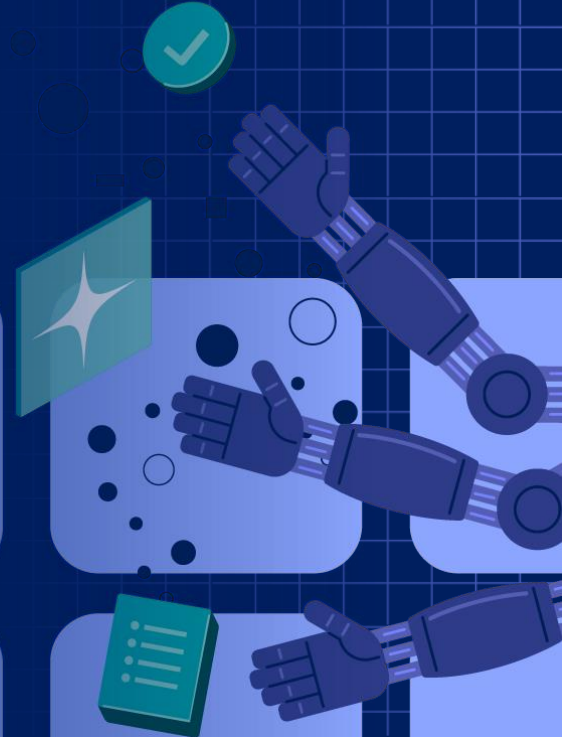
Once ready for go-live, Pega will migrate your data, including validating data integrity and performing post-migration steps. We also recommend performing a load test to confirm response time and throughput at maximum user load. Pega Diagnostic Center (PDC) – another service made available to you as a Pega Cloud client – may be used to monitor the performance of your application during testing, to address any performance impacts before going live.

After your production system is live on Pega Cloud, Pega provides two weeks of “Hypercare” monitoring. During this period, Pega performance experts are available to assist with any performance issues. And you will continue to have access to PDC (Pega Diagnostic Center) in perpetuity with your cloud subscription, to monitor application alerts that may surface.



“...over the last 12 months we’ve done 21 upgrades, they were done seamlessly, we didn’t even notice they’d been done”

**Steve Keating, CTO,  
Lloyd’s Banking Group**





# Conclusion



Your migration to Pega as a Service sets you on a new and better path with your Pega solutions. Once you're running on Pega Cloud, we'll keep you current on the latest Pega capabilities, so you can continuously innovate. Relieved of the burden of operating Pega, you can now devote your critical resources to utilizing Pega to solve business problems and harnessing the power of emerging technologies like Pega GenAI.

While there is some work involved to upgrade your application and make it cloud-ready in support of a successful migration, this is a one-time effort. Once complete, you're poised to enjoy the benefits of Pega running Pega for you on an ongoing basis, so you can get back to the business of improving your business!

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## TAKE THE NEXT STEP

### Take the free readiness assessment

- If you haven't yet, get your no charge cloud assessment at [pega.com/pega-as-a-service-readiness-assessment](https://pega.com/pega-as-a-service-readiness-assessment)
- If you've already completed an assessment, contact us at [asaserviceupgrade@pega.com](mailto:asaserviceupgrade@pega.com) to take the next step to move to Pega as a Service.

### Find out more

- Learn how Pega as-a-Service can help you focus on what matters most — your business. Visit [pega.com/exp-cloudservices/pega-cloud](https://pega.com/exp-cloudservices/pega-cloud)



Pega is the leading Enterprise Transformation Company™ that helps organizations Build for Change® with enterprise AI decisioning and workflow automation. Many of the world's most influential businesses rely on our platform to solve their most pressing challenges, from personalizing engagement to automating service to streamlining operations. Since 1983, we've built our scalable and flexible architecture to help enterprises meet today's customer demands while continuously transforming for tomorrow. For more information on Pega (NASDAQ: PEGA), visit <http://www.pega.com>