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Optimizing Packaged Applications

The Path to Fusion Strategies for PeopleSoft Owners

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- Enterprise Application Lifecycle Management solutions
 - Program Management
 - Automated Testing
 - Change Control
- Certified Oracle and PeopleSoft Software Partner
- Experts in PeopleSoft quality, testing and change
- Testing and Change control solutions integrated with PeopleSoft

- “Halfway to Fusion” & Collaborate 06 Recap
- Four Potential PeopleSoft Strategies
- Three Paths to Fusion
- Brief Overview of Newmerix *Automate!*
- Q&A

Let's Review What Oracle Announced

Fusion Now Has Three Components



- Fusion Tools
- Fusion Middleware
- Fusion Applications

Fusion Tools



- Fusion tools will replace existing application toolsets:
 - (PeopleSoft) PeopleTools, AppDesigner, DataMover, SQRs
 - (Oracle) Oracle Forms, Reports
 - (JD Edwards) OMW
 - (Siebel) Siebel Tools (implied)
- Fusion toolset based on JDeveloper
 - 100% Java Based (no legacy support for PeopleCode, BFL, SiebelVB)
 - Next generation of EBS toolset
 - GA available today
(<http://www.oracle.com/technology/products/jdev/index.html>)
- Heavy focus on SOA platform
 - Business Process Execution Language (BPEL) Manager and BPEL Engine
 - Consolidated data management
- Composite Application Framework
 - Standards based middleware stack
 - Combine Oracle apps, your own custom apps, and 3rd party components
- Database Choices
 - To date Oracle has announced support for Oracle and DB2

PeopleTools 8.47 is the first certified release for Fusion
Released November 16, 2005

- Standards based middleware stack
 - Able to reuse existing investment in middleware infrastructure
- What version of apps/tools are you on?
 - Oracle E-Business suite: 11*i* and 12
 - PeopleSoft Enterprise: 8.9 and 9.0
 - JD Edwards EnterpriseOne: 8.11 and 8.12
 - JD Edwards World: A7.3, A8.1, and the 2006 JD Edwards World release

Fusion Applications



- Fusion applications built from scratch using the best requirements from all the Oracle family of applications
- All Fusion applications built using new Fusion toolset
- First applications will become available 2008

Pros of the Announcement



- Process-based
 - SOA
 - Customize, build, and upgrade in modular chunks
- Standards-based
 - Reuse your existing application infrastructure
- Composite applications
 - Migrate custom development and Fusion development onto the same platform

Cons of the Announcement



- Customizations need “retirement”
- How to convert reports (SQRs)
- How to migrate PeopleCode
- Retrain staff on Java

Unknowns of the Announcement



- SQL Server, Sybase, Informix customers?
- When will *all* the applications for any suite be available?

Four Strategies



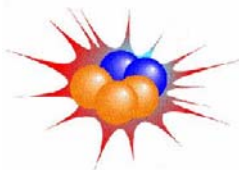
Switch



Freeze (Wait and See)



Go Legacy

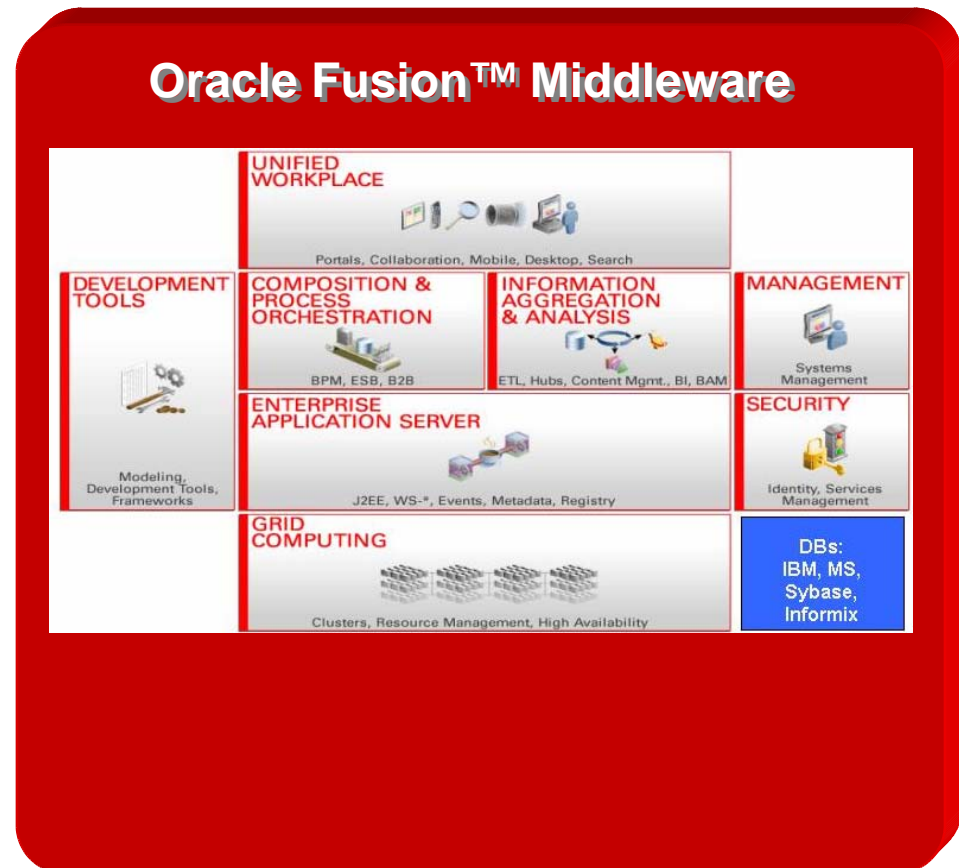
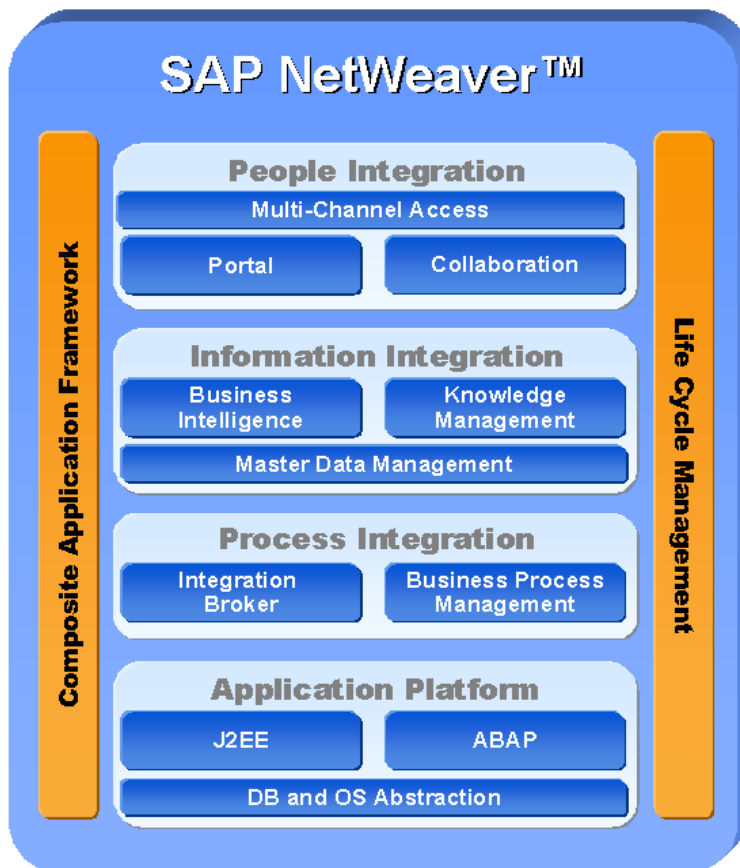


Adopt Fusion

Switch Strategy



Starting over with SAP – the technology learning curve will be very similar



Freeze Strategy



Freeze all planned upgrades and new implementations until a clear product map, technology architecture, and support structure is defined by Oracle – either through Apps Unlimited or Fusion

Pros

- Vendor support for updates/fixes (24x7 call center support)
- Access to critical fixes/patches
- Ability to stabilize application and technical environment through decreased upgrades, implementations, customization
- Vendor-supplied compliance support
- Ability to leverage existing knowledge base (IT, Users, etc.)
- Leverage vendor desire to continue customer upgrades
- Status quo in the business and technology

Cons

- Potentially higher maintenance fees for little net new value in applications
- Deferred or no access to new functionality/applications
- Potential to increase number of customizations vs. accepting vendor supplied functionality
- Increased internal support to manage user change requests
- May reach a point where a required patch may have huge upgrade implications

Go Legacy Strategy



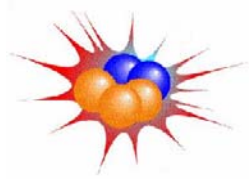
Move away from PeopleSoft to a 3rd party support provider:
TomorrowNow, BRTG, LegacyMode, Klee Associates, USi

Pros

- Lower maintenance costs
- No mandatory business disruptions
- Increased consistency in application functionality (reduced change)
- Redistribute budget to other projects
- Lower training costs

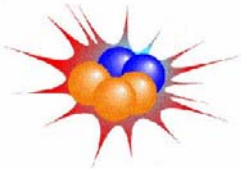
Cons

- Increased risk with 3rd party provider
- Decreased support level from Oracle
- Potential need to hire/retain additional resources
- Potential for loss of application change control if outsourced
- Potential cost of back maintenance if you decide to upgrade to Fusion is unknown



Three Paths to Fusion

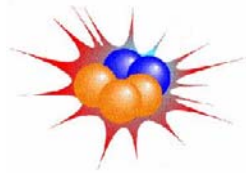
Strategy #1 : Start with Fusion Toolset



Consolidating custom and enterprise application development platforms

- Start retraining PeopleSoft staff on Java
- Find development lifecycle tools that work across the organization

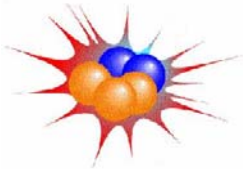
Strategy #1 : What about PeopleSoft?



Focus on standardizing and automating change management processes so your team can free up time to learn Fusion tools

- Reduce additional customizations to lower overall cost of maintenance
- Put in system to prioritize development activities
- Reduce cost of making changes to PeopleSoft by automating the change management process

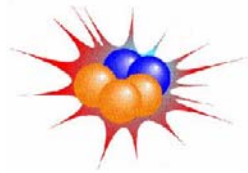
Strategy #2: Start with Fusion Middleware



Start building applications using SOA/BPEL framework

- Fusion is a business process management engine
- Integrate PeopleSoft and custom developed applications
- Integrate data across applications through customer data hubs

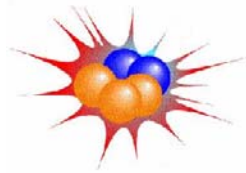
Strategy #2 : What about PeopleSoft?



Extend functionality of PeopleSoft by leveraging Fusion process platform

- Customizations should be made on Fusion middleware
- Extend testing to application inputs or outputs in non PeopleSoft applications
- Enforce rigorous change management process across PeopleSoft and Fusion

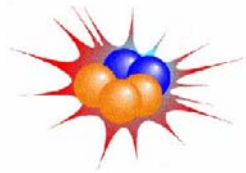
Strategy #3: Start with Fusion applications



It may be a long time until all the Fusion applications you need are available

- Document mission critical business processes
- Catalog and analyze which customizations are replaced by Fusion
- Decide which part of the business process is best for Oracle, yourself, or 3rd party

Strategy #3 : What about PeopleSoft?



You are going to live with PeopleSoft for a long time:

- Document most critical business processes to test
- Capture the best business process data involved in testing
- Automate testing as much as possible
- Prepare for these processes to span multiple applications with Fusion

Key To Succeeding

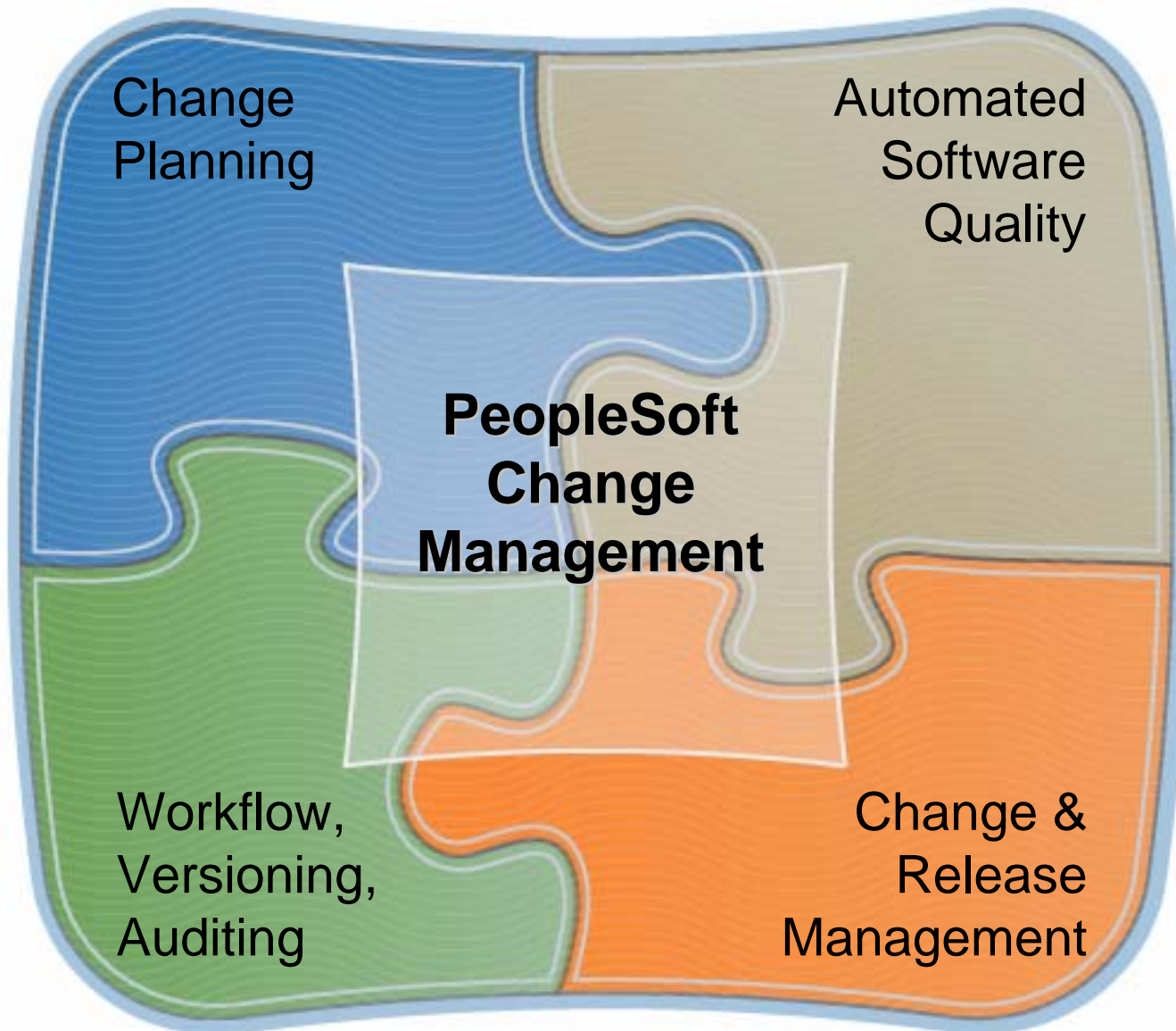


- Master change management process across PeopleSoft and Fusion
 - Define and document change processes
 - Enforce change approvals to avoid regulatory risk

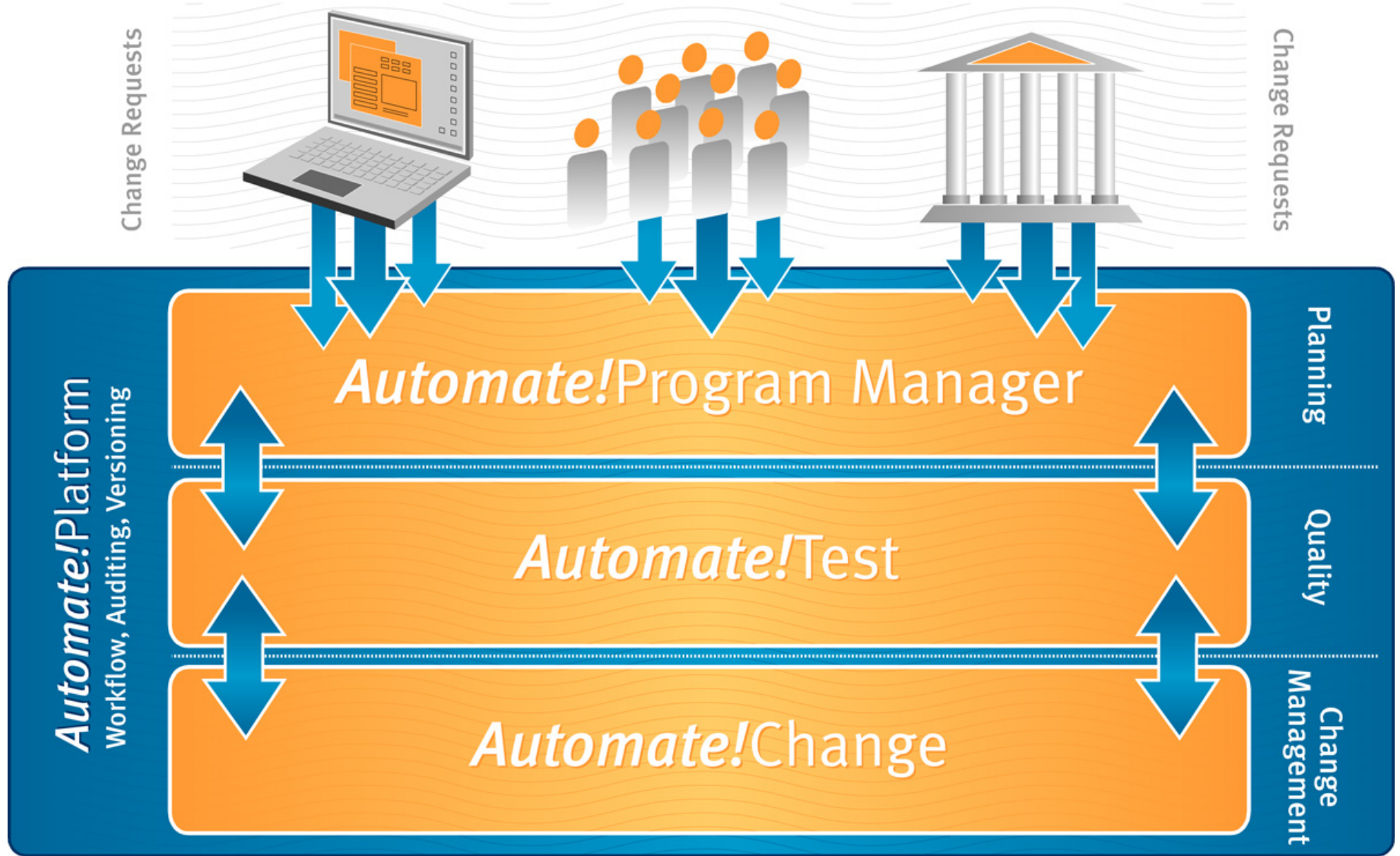
- Document, automate and improve quality
 - Capture business process test data for the best possible tests
 - Automate testing so that you can assign resources to more critical Fusion projects

- Document customizations and business processes to prepare for move to Fusion

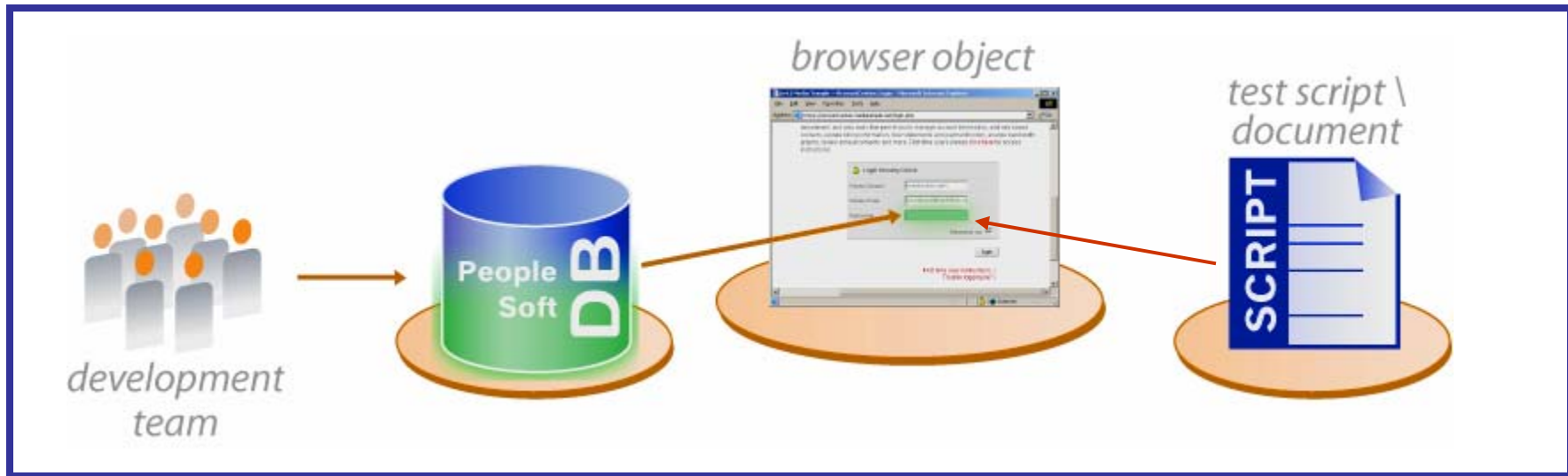
Four Disciplines of PeopleSoft Change Management



Automate!PeopleSoft Suite



Our Secret Sauce (Testing Example)



- All changes in PeopleSoft are made in the metadata
- Both PeopleSoft delivered changes and customizations occur in the metadata
- Newmerix recognizes each type of metadata change and the impact it will have on automated test scripts
- Newmerix correlates every metadata change to lines of the test script that interact with that metadata object
- Newmerix recognizes and categorizes over 1300 types of metadata changes



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Optimizing Packaged Applications

Q&A Session

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For More Detailed Information on
the Half Way to Fusion
Announcement, please go to:

<http://parallax.blogs.com>