

### Example 3: Roadmap for Small College Gettysburg College

**Background** on this example Small College:

Gettysburg College is a small liberal arts college using PeopleSoft ERP since 1997 and has a student enrollment of 2,500 students and a faculty of approximately 180. The total number of employees including faculty, administration, and support staff totals 590. Since the early 1990's, Gettysburg College has been recognized as a leader in the development and use of its College Portal System, CNAV. Recently, Gettysburg College, in collaboration with Dot Marketing, Inc., integrated an open source Content Management System into CNAV with PeopleSoft feeding ERP data.

- Financial systems baseline is PeopleSoft ver8.8 on People Tools 8.46.10.
- Human Resource and Student Administration (HR/SA) systems baseline is PeopleSoft Campus Solutions ver8.9 (in a combined environment) on People Tools 8.46.10.
- Implementing People Soft Enterprise Financials ver9.0 targeted for 2008.
- Has a small number of customized applications in both baselines in order to meet specific business needs.
- Current plans are to move to PeopleSoft ver9.0 Human Resource and Student Administration baseline in 2009/2010. This move will expand College's maintenance priorities and liabilities.
- Pressing business needs will force the acquisition or development of software in the short and long term. The school cannot "freeze" its systems and wait for next generation applications. Would like new software and enhancements to fit as well as possible into long term application plans.
- Is considering 'normal course' upgrade to Fusion applications in the future, but can't commit until overall cost of conversion, cost of ownership, and capability of applications is known. Other ERP's are being considered concurrently.
- Whether or not Fusion applications are embraced, expects to have some non-Oracle applications within its portfolio.
- Overall approach is to hold off buying new applications instead of building them from scratch. That said, expects to do more application development in the future, either as part of open source initiatives, or as part of point solutions.
- Gettysburg College is a user of Oracle databases, no other Oracle middleware in use today.
- Has a Java development capability in place. Uses mainly Cold Fusion Development, does some development with the Java application portfolio. Would like to select a single Java application development platform on which to base development..
- Would prefer to minimize duplication of infrastructure across Java environments. For example, would prefer to run one enterprise services bus, not two or more.
- Would prefer to have a limited set of infrastructure providers, but does not want to be overly committed to one vendor.
- Like most higher education institutions, is under significant financial pressures. Ongoing operational funding for administrative systems will not increase in the foreseeable future; in fact, there is pressure to decrease ongoing expenses. New ERP initiatives not funded and directly compete with college strategic initiatives.

## High-level Roadmap

The Gettysburg College plan calls for normal course upgrade maintenance through ver 9.0 and ver 9.x until 2010; then adopting Fusion applications for Financial, Human Resource and Student Administration in 2011 through 2014 timeline. The College assumption is that moving to Fusion or to other ERP's will be a NEW IMPLEMENTATION of ERP's. To prepare for these applications, college will implement various middleware components over several years. College will focus on: upgrade current baselines until end of lifecycle, staff skill set re-tool, and budget analysis/projection throughout the timeline. By the time Fusion is to be implemented, college expects to have a robust services-based infrastructure which is in use across many applications, using Web Enterprise Services (WES) vision and ready to be leveraged by the Fusion Applications.

2006	<ul style="list-style-type: none"> <li>○ Complete ERP Assessment Plan with key college senior leadership.</li> <li>○ Evaluate top higher Ed vendors: SAP, SUNGARD, JENZABAR.</li> <li>○ Complete functional business process analysis on existing ERP/datasystems.</li> <li>○ Migrate to People Tools 8.46 for both HR/SA and Financial Systems.</li> <li>○ Extend use of Oracle Enterprise Manager from its current Oracle-only use, to also oversee PeopleSoft environment</li> <li>○ Continue to enhance and extend PeopleSoft applications, eApps, PeopleTools apps</li> <li>○ For systems, begin using XML Publisher for new reports. Also convert some existing reports to XML Publisher as well</li> <li>○ Begin tech staff re-tool to beginning Java skill sets,</li> <li>○ <u>Complete HR/SA ver8.9 upgrade</u></li> </ul> <p>Review ERP budget position with senior leadership, project 5-7 yr costs.</p>
2007	<ul style="list-style-type: none"> <li>○ Complete technical process analysis on existing ERP/datasystems.</li> <li>○ Migrate to People Tools 8.48 for both HR/SA and Financial Systems.</li> <li>○ Set up Oracle IAS with Finance ver9.0 'sandbox.'</li> <li>○ Use Component Interfaces to expose HR/SA functionality as services. Use Service Designer to expose financial functionality as services to CMS/CNAV.</li> <li>○ Deploy XML Publisher for Financial environment</li> <li>○ Consider addressing pressing business needs with new PeopleSoft modules</li> <li>○ Select a strategic Java development and runtime platform including supporting web services infrastructure (e.g. services directory)</li> <li>○ Continue to enhance and extend PeopleSoft applications with PeopleTools, but pilot extensions through Java</li> <li>○ <u>Complete PeopleSoft 9.0 Upgrade for FS (Skip 8.9 upgrade).</u></li> <li>○ Build initial New Implementation budget projections for 2010-2015.</li> </ul>
2008	<ul style="list-style-type: none"> <li>○ Create decision matrix course of actions for Senior leadership</li> <li>○ As part of upgrade, deploy OC4J and XML Publisher, and extend use of Oracle Enterprise Manager to HR/SA environments</li> <li>○ Use Service Designer to expose HR/SA and Financial functionality as services</li> <li>○ For HR/SA systems, begin using XML Publisher for new reports. Also, convert some existing reports to XML Publisher as well</li> <li>○ Acquire and deploy web services management infrastructure components</li> <li>○ Acquire and deploy financial data hub</li> </ul>

	<ul style="list-style-type: none"> <li>○ Begin tech staff re-tool to intermediate Java skill sets,</li> <li>○ Finalize budget expectations for New Implementation.</li> </ul>
2009	<ul style="list-style-type: none"> <li>○ Decide on college ERP course of action</li> <li>○ Start to minimize use of PeopleTools for extensions, and leverage Java more and more</li> <li>○ Acquire and deploy Person data hub (or appropriate HR/SA hubs)</li> <li>○ Migrate to People Tools 8.49/8.xx for both HR/SA and Financial Systems.</li> <li>○ <u>Complete upgrade of HR/SA to PeopleSoft 9.0</u></li> <li>○ Review/budget alternate maintenance capability scheme, Unlimited Apps</li> </ul>
2010	<ul style="list-style-type: none"> <li>○ Review Fusion product releases to determine which products to upgrade to PeopleSoft 9.x and which to move to Fusion applications for Financial systems</li> <li>○ Continue tech staff re-tool to intermediate/advanced Java skill sets,</li> <li>○ Revise budget projections/actuals</li> </ul>
2011	<ul style="list-style-type: none"> <li>○ Review Fusion product releases to determine which products to upgrade to PeopleSoft 9.x and which to move to Fusion applications for HR/SA systems</li> <li>○ Complete tech staff re-tool to JTool Kit/ADF Java skill sets,</li> <li>○ <u>Complete move to Fusion ver1.x/ver2.x applications for Financial systems</u></li> <li>○ Revise budget projections/actuals</li> </ul>
2012	<ul style="list-style-type: none"> <li>○ Begin move to Fusion applications for HR and SA systems</li> <li>○ Complete move to Fusion ver1.x applications for Financial systems</li> <li>○ Revise budget projections/actuals</li> </ul>
2013	<ul style="list-style-type: none"> <li>○ Complete move to Fusion ver1.x/ver2.x applications for HR/SA systems</li> <li>○ Revise budget projections/actuals</li> </ul>
2014	<ul style="list-style-type: none"> <li>○ All PeopleSoft applications replaced.</li> </ul>