IBM Information Management software

IBM Information Integration Solutions and PeopleSoft EPM: An OEM Partnership

ON DEMAND BUSINESS™

Contents

This white paper explores the capabilities and options available to PeopleSoft Enterprise Performance Management (EPM) customers with embedded IBM® WebSphere® DataStage® and IBM WebSphere MetaStage® products. It summarizes the partnership between IBM Information Integration Solutions and Oracle/PeopleSoft and outlines the benefits offered to PeopleSoft EPM customers. Finally, it presents different scenarios that PeopleSoft EPM customers may encounter as they address their unique strategic business needs along with the service offerings IBM makes available to help meet these needs.

Partnership overview

In 2003, PeopleSoft performed a thorough solution review to determine the best way for customers to easily populate PeopleSoft EPM with PeopleSoft and non-PeopleSoft data and to provide a scalable metadata management capability. PeopleSoft worked closely with Ascential Software (now known as IBM Information Integration Solutions), which provided numerous enhancements and new functionality to Ascential DataStage (now known as IBM WebSphere DataStage) to satisfy PeopleSoft requirements.

The result was an OEM agreement between the companies in January 2004 whereby PeopleSoft replaced the Informatica extract, transform and load (ETL) product and began shipping WebSphere DataStage with PeopleSoft EPM 8.8.

PeopleSoft made this strategic OEM agreement to help its customers in several areas:

- *WebSphere DataStage offers more flexible technology and has the same or better performance for ETL processing.*
- *IBM has more advanced metadata management.*
- *WebSphere DataStage has proven production scalability in very large data integration environments.*
- *IBM has unique data profiling and data quality tools integrated into IBM Information Server.*
- *IBM products are designed to work easily in a Service Oriented Architecture (SOA) on demand environment.*
- *IBM Information Server affords PeopleSoft customers the opportunity to reduce the total cost of ownership in additional application areas.*

Expanded partnership

The PeopleSoft tools group evaluated the use of WebSphere DataStage as part of the effort to make upgrading to new releases of PeopleSoft applications faster, less expensive and more efficient. This new, streamlined process called Accelerated Upgrade was announced at the PeopleSoft Connect User Conference in September 2004. A key component of the new process was to replace all data movement from SQL-based script technology to WebSphere DataStage.

A joint development effort began in 2004 to add metadata functionality to the EPM 8.9 release. In EPM 8.8, PeopleSoft tools called DataWarehouse and DataMart Builder were still handling much of the data movement. In EPM 8.9, WebSphere DataStage was expanded to handle all data movement and the DataWarehouse and DataMart Builder tools were no longer part of PeopleSoft EPM.

In May 2005, Oracle released PeopleSoft EPM 8.9 with embedded WebSphere DataStage and IBM WebSphere MetaStage. This offering includes the expanded use of WebSphere DataStage with more than 6,000 prepackaged WebSphere DataStage jobs and an EPM metadata console designed to work with the embedded WebSphere MetaStage product. With the current release of EPM 9.0, PeopleSoft continues with this integration and increased support for more current releases of WebSphere DataStage.

The partnership agreement expanded to include the following:

- *IBM provides a conversion program to help migrate or upgrade EPM 8.x customers currently using Informatica to EPM 8.8, 8.9 or 9.0 with IBM Information Integration Solution products.*
- *Oracle's application sales force can resell WebSphere DataStage Packaged Application Connection Kits (PACKs) for connectivity to other major enterprise software programs, such as SAP, Oracle Applications, JD Edwards and Siebel.*
- *Oracle continues to support existing EPM customers with older releases using Informatica, even though the product is no longer being shipped or supported for new PeopleSoft EPM customers.*

EPM embedded products from IBM Information Integration Solutions

The following products are embedded within PeopleSoft EPM:

IBM WebSphere DataStage Server Edition—prepackaged EPM 8.8, 8.9 and 9.0 ETL jobs. PeopleSoft distributes a full-featured version of WebSphere DataStage for use with the PeopleSoft EPM product line. All prepackaged ETL jobs that ship with EPM are built, tested and supported using the IBM WebSphere DataStage Server Edition product. Oracle resells the WebSphere DataStage PACKs for connectivity to Siebel and SAP.

IBM WebSphere MetaStage—EPM 8.9 metadata management. PeopleSoft distributes WebSphere MetaStage as an OEM product and has embedded it into EPM 8.9 and 9.0 as the Metadata Console. This includes the PeopleSoft MetaBroker, which captures PeopleTools metadata into WebSphere MetaStage.

The Metadata Console is not part of any releases prior to EPM 8.9. If customers wish to use WebSphere MetaStage with an earlier version of EPM, they must license it from IBM. However, the PeopleSoft MetaBroker will be delivered only with the OEM PeopleSoft EPM 8.9 and 9.0 versions of WebSphere MetaStage as part of the Metadata Console.

IBM also offers additional metabrokers for popular business intelligence tools—
Cognos, Business Objects, Hyperion and MicroStrategy—and modeling tools
such as Erwin, Oracle, Embarcadero and UML. These tools must be purchased
directly through the IBM sales force.

PeopleSoft OEM embedded component summary

PeopleSoft EPM 8.8
- Uses WebSphere DataStage 7.1
- Includes prebuilt WebSphere DataStage jobs to extract data from
  PeopleSoft applications into the EPM staging area

PeopleSoft EPM 8.9
- Uses WebSphere DataStage 7.5
- Includes redesigned WebSphere DataStage jobs to load staging area
- Replaces SQL-based tools—Warehouse Builder and DataMart Builder—
  with prebuilt WebSphere DataStage jobs
- Includes PeopleSoft EPM 8.9 Metadata Console
  – Uses WebSphere MetaStage 7.5
  – Uses PeopleSoft MetaBroker

PeopleSoft EPM 9.0
- Uses WebSphere DataStage 7.5.1A
- Includes redesigned WebSphere DataStage jobs to load staging area and
  EPM data warehouse and datamarts
- Includes PeopleSoft EPM 9.0 Metadata Console
  – Uses WebSphere MetaStage 7.5
  – Uses PeopleSoft MetaBroker

PeopleSoft EPM with IBM Information Integration Solutions licensing

The OEM partnership has licensing agreements that describe how WebSphere DataStage and WebSphere MetaStage can be used. If EPM is involved, the use of WebSphere DataStage and WebSphere MetaStage is permitted. Any other use requires additional licenses from IBM. The following situations are licensed:
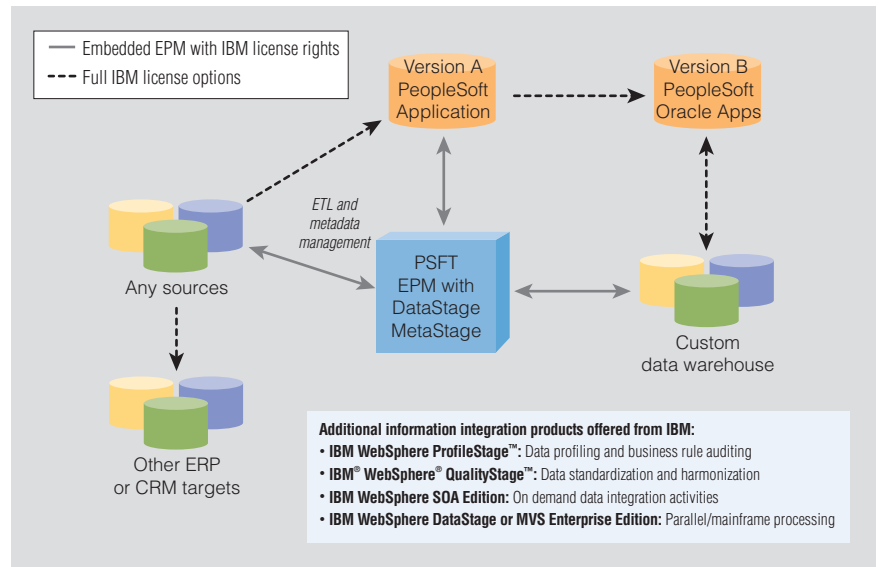
- *Sourcing data from any PeopleSoft application—such as Human Capital Management (HCM), Financial Management Solutions (FMS), Customer Relationship Management (CRM), Supply Chain Management (SCM) and so on—into EPM*
- *Sourcing data from any non-PeopleSoft application into EPM*
- *Moving any data within the EPM application*
- *Moving data between existing PeopleSoft applications*
- *Extracting updated data from EPM back to any source application that feeds EPM—a process called* closing the loop; a*n example is sending budget information that has been updated in EPM back to PeopleSoft FMS*

The license for embedded WebSphere DataStage has no restrictions regarding the number of CPUs or development, test or production EPM systems with which it can be used.

The following data integration scenarios require additional licenses from IBM because they are not part of the OEM agreement:

- *Sourcing data from any PeopleSoft application, such as HCM, FMS, CRM, SCM and so on, into a customer warehouse or datamart that is not part of EPM*
- *Sourcing data from any non-PeopleSoft application into a customer warehouse or datamart that is not part of EPM*
- *Migrating existing non-PeopleSoft data into a PeopleSoft application*
- *Consolidating multiple applications into a single instance of a PeopleSoft application*

Figure 1: Summary of licensing rights

The use of any other IBM Integration Information Solutions product for data quality, on demand processing and so on requires a license from IBM directly. Figure 1 summarizes the licensing agreements.

IBM migration program for PeopleSoft EPM customers

PeopleSoft and IBM offer a migration program to existing EPM customers currently using Informatica. The EPM customer initiates the process by requesting PeopleSoft and/or IBM to scope the necessary work and recommend the time and resources needed to migrate or upgrade the EPM customer.

PeopleSoft EPM customer support

PeopleSoft fully supports the embedded WebSphere DataStage and WebSphere MetaStage products that are shipped as part of the EPM application. Specific instructions for installing and configuring WebSphere DataStage EPM jobs and servers are available.

Available customer support includes:

- *First-line support. All questions about EPM, including WebSphere DataStage and WebSphere MetaStage products, go directly to PeopleSoft. PeopleSoft Global Customer Support (GCS) determines the type of issue—training, job problem, product problem and so on—and takes the appropriate action for resolution.*
- *Second-line support. If the problem resides with the supplied WebSphere DataStage jobs, the EPM development team becomes involved to rectify design issues and job-specific problems. If the problem lies with WebSphere DataStage Enterprise Edition, IBM will handle second-line support.*
- *Third-line support. For problems with IBM products, IBM Support will work directly with IBM and PeopleSoft developers, GCS and the customer to resolve the problem.*

PeopleSoft provides a two-day training module for WebSphere DataStage within the larger training available for EPM. Customers who want additional WebSphere DataStage training (such as advanced or best practices training) can purchase it directly through IBM.

IBM data integration options for PeopleSoft customers

Customers using PeopleSoft applications to solve strategic business problems have unique environments and specific local constraints that often require additional components and functionality to provide complete solutions. These issues may require additional services and expanded licenses. IBM is prepared to make available a number of service offerings to address specific customer needs. The following list describes typical scenarios that PeopleSoft customers may encounter:

Scenario 1—Optimizing investments

A PeopleSoft customer would like help configuring, implementing, customizing or tuning the performance of PeopleSoft EPM with the embedded WebSphere DataStage product. An IBM consultant identifies the customer performance requirements, reviews the customer environment, reviews the WebSphere DataStage EPM jobs and provides recommendations for solving performance issues. Some tasks may include redesigning the jobs, fine-tuning the database, optimizing the environment or recommending additional IBM products. Consultants will work with the customer to carry out the recommendations.

Scenario 2—Expanding data movement usage

A PeopleSoft customer wants to move data between non-EPM environments. This process requires expanding the limited-use WebSphere DataStage license to include other sources and targets other than PeopleSoft EPM. An IBM solutions architect works with the customer to develop an appropriate architecture and to identify the additional licenses. IBM consultants also can be enlisted to design, build and implement the unique customer jobs necessary to move the data.

Scenario 3—Scaling for extremely large data volumes

PeopleSoft customers who have large volumes of data may not be accommodated by the results of scenario 1. In this case, customers need to consider upgrading some jobs from WebSphere DataStage Server. Some methods to accomplish this are described below.

IBM WebSphere DataStage Enterprise Edition. This edition enables scalable data movement for very large information integration processing. WebSphere DataStage Enterprise Edition provides support for parallel execution at a greater level of scalability. It can help improve performance dramatically on very large database tables. This edition requires an extension to the embedded WebSphere DataStage license and must be obtained separately from the IBM sales force. Because WebSphere Data Stage Enterprise Edition is based on a parallel or grid architecture, the ETL jobs that are prepackaged with EPM 8.8 and 8.9 solutions will not run on this edition and must be converted.

IBM WebSphere DataStage MVS Edition. This edition provides information integration directly on the mainframe. WebSphere DataStage MVS™ Edition runs natively on the mainframe. The advantage is that it leverages mainframe processing capabilities and processes data transformations where the mainframe data resides without moving it to a separate server. WebSphere DataStage MVS Edition requires an additional license that must be obtained separately from the IBM sales force. This edition is based on COBOL, so jobs that are packaged with EPM 8.8 and 8.9 solutions will not run on the edition and must be converted.

IBM has developed migration utilities that convert WebSphere DataStage jobs to either the WebSphere DataStage Enterprise Edition or the WebSphere DataStage MVS Edition format. This IBM conversion service accelerates the process of converting prepackaged EPM jobs. The conversion requires professional services assistance from IBM Integration Information Solutions to convert, tune and test the jobs in the customer environment.

PeopleSoft will continue to provide first-line support for these converted jobs. If PeopleSoft EPM support determines any problem with a converted EPM job, second-line support will be provided directly by IBM customer support.

Customers who choose to convert WebSphere DataStage jobs to work with WebSphere DataStage Enterprise Edition or WebSphere DataStage MVS Edition also will need to convert the prepackaged jobs for Integration Updates, if and when they move to a new release of PeopleSoft Enterprise or a new release of EPM.

Scenario 4—Application consolidations

PeopleSoft customers may need to consolidate multiple PeopleSoft applications or other applications performing the same function into one enterprise application. Examples include consolidating multiple HR or financial applications in use across a large enterprise or consolidating multiple GL charts of accounts into one chart of accounts for the entire organization. To consolidate these operations into a single application requires several functions:

- *Understand the data structure and content of older existing applications*
- *Standardize and harmonize the information across the applications*
- *Identify and resolve duplicates across the applications*
- *Clean up the data and load it into a single application*

IBM Information Server, which includes data profiling, data quality tools and WebSphere DataStage, can be leveraged to handle these functions; however, additional licenses must be obtained separately from IBM. IBM offers a repeatable consulting methodology and architectural services, as well as the ability to implement the solution for customers.

Scenario 5—Data hubs and master reference data harmonization

PeopleSoft and Oracle customers want a single view of their critical data—customer, vendor, inventory and so on. Consolidating common data and information from different application models is similar to scenario 4. The difference in this scenario lies in how to maintain this master reference data as new sources and data are being added constantly in many different systems. Customers can leverage IBM Information Server to build a data hub that manages this process in real time on an ongoing basis.

The tools in IBM Information Server require additional licenses that must be obtained separately from IBM. A repeatable consulting methodology and architectural services, as well as the ability to implement the solution for the customer is available from IBM.

Scenario 6—Migrating existing systems to PeopleSoft or Oracle applications

A customer with an existing PeopleSoft or Oracle application must migrate this existing data into a new application. The customer first needs to understand the content, completeness and accuracy of the legacy data and verify the data quality. The data must be cleaned and loaded in an efficient and easy-to-use manner. The customer can leverage IBM Information Server in this process, which requires additional licenses that must be obtained separately from the IBM sales force.

Scenario 7—On demand data integration

A PeopleSoft or Oracle customer has a Service Oriented Architecture (SOA) and wants to provide online access to information for its customers and agents. The information used in these business functions must be integrated into the underlying applications. IBM provides SOA components that automatically integrate with IBM Information Server. These components require additional licenses that must be obtained separately from the IBM sales force.

Oracle and IBM Information Integration Solutions partnership

Although two acquisitions and product branding changes have occurred in the last year, the basic co-development and reasons for the relationship between Oracle (PeopleSoft) and IBM Information Integration Solutions (Ascential) have not changed. With EPM 8.8, PeopleSoft began embedding, shipping and supporting WebSphere DataStage 7.1 in January 2004. With EPM 8.9, the company began embedding, shipping and supporting WebSphere DataStage 7.5 and WebSphere MetaStage 7.5 in May 2005. The relationship remains the same with the current EPM 9.0 release.

The original partnership between PeopleSoft and Ascential remains strategic for both Oracle and IBM:

- *Oracle wants to retain and support the PeopleSoft customer base.*
- *Many PeopleSoft customers have made significant investments in IBM hardware, software and consulting services.*
- *Oracle and IBM both stand to gain from satisfied PeopleSoft customers who may purchase additional products and services from both companies in the future.*

For further details on the Oracle commitment to PeopleSoft, see oracle.com/peoplesoft/psft_jde_commitment.html

To help meet your goals for the integration, migration and customization of your EPM applications, the IBM team offers the Production Readiness Services Workshop for PeopleSoft EPM customers. This workshop provides the tools and roadmap needed for a successful conversion and migration of applications, including project planning, methodology and best practices for optimizing enterprise data integration applications throughout your production environment.

For more information

For additional information, please contact your local IBM Information Integration Solutions account executive or visit **ibm.com**/software/data/integration

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