



# *PHEAA welcomes the new millennium with fully integrated financial system.*

If you are a college or graduate student who needs help financing your education, you can turn to the Pennsylvania Higher Education Assistance Agency (PHEAA). Located in Harrisburg, PA, PHEAA is one of the largest full-service financial aid organizations in the United States. It manages more than \$33 billion in total assets and serves nearly 4 million students nationally through its state grant, guaranty, loan servicing and financial aid processing systems. PHEAA is also the designated guarantor for student loans in Delaware, Pennsylvania and West Virginia and it provides state grants for Pennsylvania students attending colleges or universities anywhere in the U.S.

*“It was almost a given that we would go to IBM Global Services to help us set up and configure the PeopleSoft applications.”*

– Robert Frank, PeopleSoft Project Manager, PHEAA

## **The challenge**

“We had numerous systems to fill our needs, but they weren’t cohesive,” explains Robert Frank, PeopleSoft project manager. “We knew we wanted an integrated system in which all the pieces would work well together.” Frank and his team faced a choice: bring PHEAA’s patchwork legacy systems to Year 2000 compliance, or replace its entire financial system.

As a first step, PHEAA issued a Request for Proposals to software vendors in the enterprise application segment. After a careful review, the agency elected to replace its existing systems and purchased PeopleSoft Financial Suite for the Public Sector.

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## **Application**

Financial system, including purchasing, general ledger, accounts payable, accounts receivable and asset management functions

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## **Software**

PeopleSoft Financial Suite  
IBM DB2®

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## **Hardware**

IBM RS/6000®

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*PHEAA headquarters in Harrisburg, Pennsylvania*



“Once we decided to purchase the PeopleSoft suite, we had to decide on a database platform,” Frank recalls. “We had IBM DB2 running on our IBM mainframe, so we had extensive DB2 experience in-house. We wanted to be able to use that expertise to contribute to the PeopleSoft project.”

PHEAA also selected IBM RS/6000 server hardware, in large part because of its positive prior experience. The agency has other RS/6000 hardware on-site and has been happy with the servers’ performance and reliability, as well as the service and support provided by IBM.

### **IBM Global Services helps with implementation**

With IBM hardware and software, “it was almost a given that we would go to IBM Global Services to help us set up and configure the PeopleSoft applications,” Frank notes. Roughly three months after PHEAA purchased the PeopleSoft suite, IBM Global Services consultants got to work. They began in September 1998, and the system went live on July 1, 1999.

The consultants helped with the DB2 set-up and its interaction with PeopleSoft. IBM also assigned an IBM DB2® Universal Database™ consultant to the project. “He has been instrumental in the success of PHEAA’s project,” Frank says. “He went well beyond the call of duty. This project could not have been completed on time without him.”

### **A learning curve**

Training PHEAA’s 150 to 180 system users varied from group to group. Many of the individuals who use the system every day were involved during implementation, so they received on-the-job training. Once the system went live, they only needed a few classes to provide training specific to their individual jobs. Others, who have more peripheral interaction with the system, required more intensive classroom training.

Frank says his agency is very happy with the way the system is working. “We were able to do business the whole time [the system was being installed], which was very important. We could pay our bills, deposit our receipts and purchase new items without disruption. And since we installed the system, all of the modules have been functioning beautifully.”

### **For more information**

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