October 2004

YES!

You can have big business functionality at small business affordability

World's Wide Reach

PeopleSoft World Express is the right-sized solution to help small- and medium-sized businesses grow *page 6*

Research shows PeopleSoft World Express outperforms competitors for smaller businesses *page 10*

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Thinking Big for Small Companies

I've heard it said that technology innovation starts with solutions for the big guys and trickles down to solutions for small and medium businesses (SMBs). But at PeopleSoft* we don't believe that innovation is top-down. We understand that creative business ideas often start in entrepreneurial companies. So we've partnered with these companies to leverage their expertise and better anticipate the emerging technologies needed for new business practices.

The result was the release of the latest edition of PeopleSoft World in May of 2004—PeopleSoft World Express, a software system that gives SMBs the reliability and "always-on" availability the big guys have had, but with specific solutions for SMBs. PeopleSoft World Express has built-in flexibility to support the unique ways that agile, growing businesses work, and it accommodates smaller IT staffs and limited budgets. This gives small businesses an affordable solution that delivers robust functionality at an incredibly low total cost of ownership.

Running on IBM* @server iSeries* hardware, PeopleSoft World Express helps businesses with complex business processes that span the entire organization. We've begun by rolling out PeopleSoft World Express for wholesale distributors, manufacturers, construction companies and home builders. And plans are underway to add more industries. Our industry-specific solutions allow companies to benefit from the best practices of their industries, but they're not locked into practices that aren't best for their individual businesses. Out-of-the-box processes can be tailored with ease to meet unique business requirements.

From a hardware perspective IBM iSeries servers represent the ideal platform for the SMB. Our partnership with IBM is nothing new. It dates back to 1984 and the first PeopleSoft World customer.

PeopleSoft World and the iSeries server have a track record of outstanding reliability. Today, more than 3,400 customers worldwide use PeopleSoft World. Never has there been a virus. Software quality and system availability exceed 99 percent.

We designed PeopleSoft World Express to give you extensive functionality, small business affordability and unequaled reliability. The articles in this magazine provide a new perspective on the business solutions available to SMBs today.

Dave Siebert
General Manager and
Group Vice President
PeopleSoft World

PHOTO BY DAVID X. TEJADA

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The Relevance of POWER5

A Q&A with IBM's Frank Soltis on what the POWER5 processor means for iSeries

By Doug Rock

Many of us who work in the technology industry have an appetite for the speeds and feeds of the latest servers and processors. We like to compare megahertz, disk space and memory. We're intrigued by bandwidth. We're interested in I/O; however, we only want to go so deep. At the end of the day, what many of us really want to know is how any particular technology benefits our business.

The new POWER5* processors are a good example. Users of IBM* @server iSeries* servers are curious when it comes to the technology's "measurements," but as an iSeries customer, what they really want to know is how the POWER5 processor benefits the platform. To find the answers to such questions, **YES!** Magazine recently caught up with IBM Chief Scientist Frank Soltis to get his thoughts on what the new POWER5 processors will mean for iSeries. As always, Frank, who is known worldwide as the father of the AS/400* server, provided some valuable insight into how Power Architecture* will benefit and drive iSeries technology for years to come.

Frank Soltis, IBM Chief Scientist, explains the importance of the POWER5 processor for iSeries users.

Q Frank, will you provide some background on POWER4* technology so we can see how the processor architecture is evolving?

A When we put out POWER4, it was a statement to the world that IBM can build very high-performance data processors. We actually pushed the processor technology to the supercomputing level. As a result, the POWER4 processor was designed for high-end systems. It requires a significant amount of power (electricity). Because of that fact, it runs quite hot and there are challenges in putting these chips in smaller-sized servers. Intel* ran into the same problems with Itanium.

IBM's advantage is that it has superior cooling technology. We have thermal modules that we pioneered in our mainframe computers over the years. We were able to package that early POWER4 processor so it was able to dissipate about a half of a kilowatt of heat. That's significant; however, it still ran too hot to deploy in a small server.

Q How is the POWER5 processor different?

A The POWER5 processor is designed for small and midsize computers. In my opinion, that's the most significant aspect of the POWER5 technology. From an iSeries server perspective, we can use it up and down our entire product line because the POWER5 technology has something we call Power Islands. The POWER5 processor actually shuts down portions of the chip when they aren't needed, so the amount of heat dissipated by the chip is minimized.

I come into contact with customers all the time who say, "Wow, I hear all of this cool stuff that IBM is doing with the iSeries server and POWER4 technology. You have it in your high-end models, but we're a small or midsize company, and that isn't what we buy. When will this processor technology come to the smaller iSeries models?"

With POWER5 technology the entire iSeries server line will leverage the same processor technology. And the iSeries server was the first IBM* server to run the POWER5 processor. That makes me feel very positive about the direction of iSeries, and I think customers will feel the same way.

Q What types of increased function will iSeries customers experience with the POWER5 processor?

PHOTO BY CRAIG BARES

The functions that were previously available in the higher-end iSeries models will now begin to become available on the smaller iSeries servers, such as greater logical partitioning (LPAR) granularity and some on demand functionality. The new iSeries OS, i5/OS*, delivers additional technologies enabled by the POWER5 processor. The bulk of our customers have yet to take advantage of those technologies.

Q You're constantly on the road speaking to customers. How are they responding when you talk to them about POWER5?

A I was in Italy recently; the Italian market has generally bought some of the smallest AS/400 and iSeries servers, simply because there are so many small businesses in that country. If you remember the days of the AS/400 portable, that was a huge seller in the Italian market. The Italian customers I spoke with are very excited about the POWER5 technology and the prospect that the smallest iSeries servers will come with the latest IBM technology. That's very positive.

Q POWER5 technology that crosses multiple IBM server lines. Will you explain?

A I think this is also going to have a very positive impact on other IBM server customers. Take the pSeries* server (which runs IBM UNIX*, or AIX* OS) for instance. I've spoken to a number of IBM server customers who are using the pSeries platform. Customers are interested in simplifying their complex IT environments, and now IBM server customers can run AIX on iSeries

servers. iSeries servers running on POWER5 processors enable these customers to consolidate and balance their disparate OSs (OS/400*, AIX, Linux and Windows*) on the iSeries. There's no other vendor in the marketplace that can say that.

In addition to that, there are a number of iSeries customers running various UNIX flavors. With an iSeries server running a POWER5 processor, those customers should be taking a hard look at bringing those various UNIX applications over to IBM's AIX and then running them on a POWER5 iSeries server. If you want to consolidate—and simplify—your computing environment, the iSeries server now provides a viable and alluring option.

Q You've been involved with the AS/400 (iSeries) server from the beginning. How significant is this POWER5 announcement?

A I'm hopeful that it will be extremely big. For one, it puts iSeries servers on the same technology path as the rest of the IBM server line. I don't think it's accurate, but the iSeries server sometimes takes a hit for not having the latest IBM server technology. That has now become a very tough position to support. iSeries servers not only have the latest IBM processor technology, we're the first IBM platform to deploy it. We'll also be able to leverage that fact to bring on new iSeries customers. iSeries servers have always delivered world-class reliability and scalability, now its processor is world class as well. ■

Doug Rock is editor and publisher of IBM's @server magazine. Doug can be reached at djrock1@us.ibm.com.

Message from
Mike Borman

If you run a small or medium business, you know there's one challenge you face that's the same as large enterprises: you need a manageable, affordable way to share information across the business. PeopleSoft* World Express on the IBM* @server iSeries* platform gives you the solution you need.

The PeopleSoft World and iSeries solution enables you to enhance control of business processes, streamline inefficient operations and manage growth more effectively. In addition, you get the industry-leading platform support of iSeries, one of the world's most reliable, cost-effective business computing platforms.

What kind of benefits can you expect to see? We use the Three-in-One Benchmark to demonstrate the ability of iSeries servers to run multiple applications, including PeopleSoft World, under typical, everyday stresses without compromising performance, usability and reliability. Recently we ran this benchmark on the IBM @server i5 Model 520, part of the next generation iSeries platform based on innovative POWER5* technology. The results demonstrate that by running multiple applications on a single server, you can more effectively exploit the full capacity of your IT infrastructure, helping reduce total cost of ownership and increase manageability.

Throughout the 15-year evolution from AS/400* to iSeries servers, IBM has continually reshaped the product to respond to advances in technology and the changing needs of the marketplace. We believe our relationship with innovators like PeopleSoft and the small to medium businesses we're partnering to serve will only grow stronger in years to come.

Mike Borman

Mike Borman, IBM @server iSeries General Manager

World's W

PeopleSoft World Express
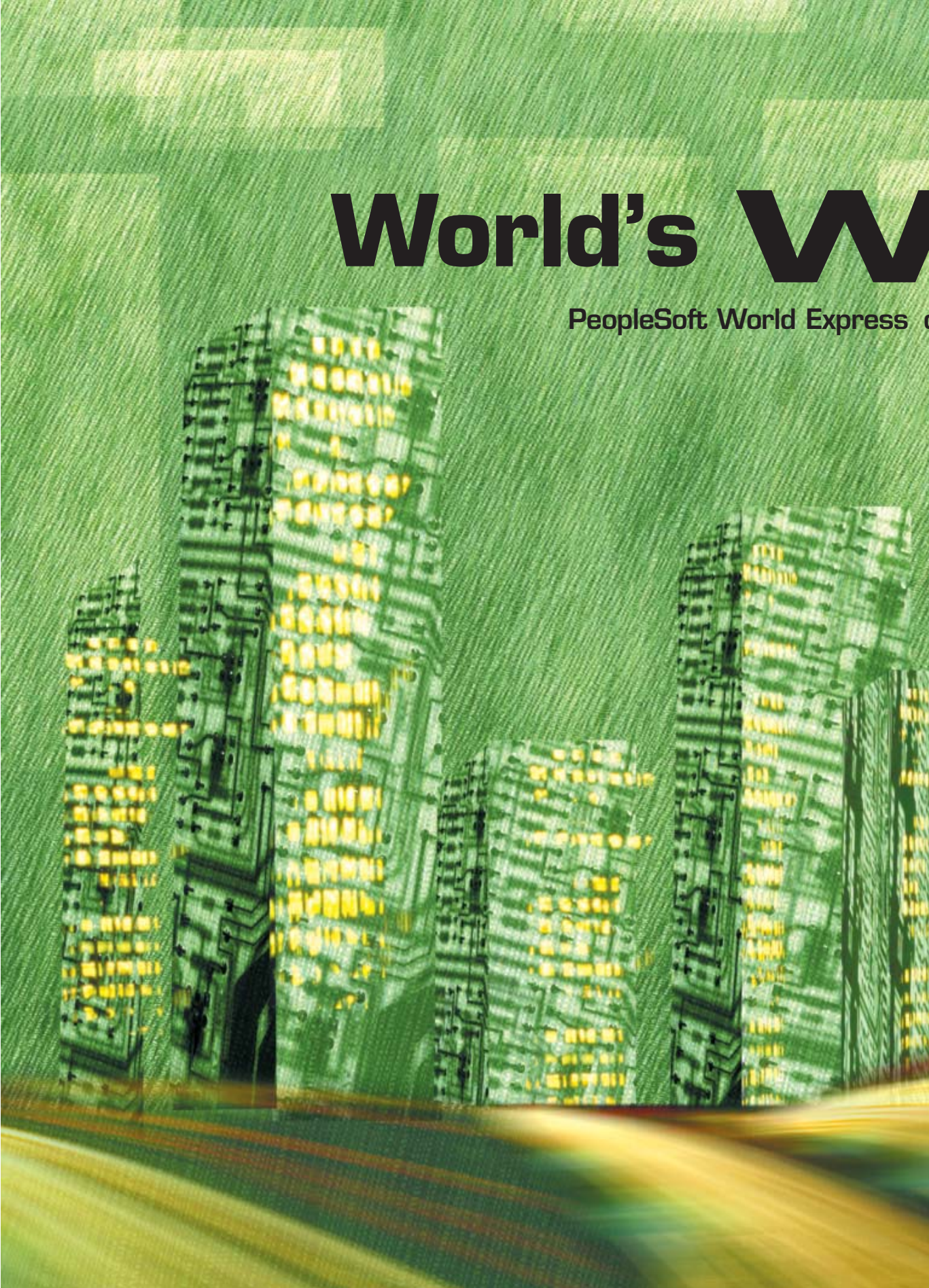
Wide Reach

s capabilities expand as small- and medium-sized businesses grow

by Jim Utsler

Unless money-rich investors are backing them, most businesses start off small, the result of a few entrepreneurial people and a bright idea. There's hope that, with a lot of hard work and diligent marketing, they'll soon grow and begin hiring staff to match their increasing customer base and market share. Along the way, they'll of course build IT infrastructures of sorts, with hardware and software supporting their efforts.

All too often, however, these environments are cobbled together, resulting in multiple, unrelated databases and applications that don't easily communicate with one another. As the companies grow, they're soon faced with business processes and IT solutions that don't scale, which leaves them unable to quickly respond to the competitive forces of the marketplace.

What small- and medium-sized businesses (SMBs) need are near-turnkey solutions that handle all of their transactions and that give them a single image of their businesses. Unfortunately, many such integrated software and hardware solutions are too expensive for them to implement because they are usually designed and built for larger enterprises. Left out in the cold, SMBs must expand upon already shaky IT foundations that may consist of nothing more than off-the-shelf PC servers and financial applications.

Realizing the predicament many SMBs are in, PeopleSoft* recently announced a new PeopleSoft World (formerly known as J.D. Edwards WorldSoftware) offering called PeopleSoft World Express. It provides SMBs within targeted industries the power of a full-blown enterprise resource planning (ERP) solution without the high implementation costs and staff-hungry setups and maintenance. As John Schiff, director of product management for PeopleSoft World, explains, "This solution will scale as demanded, so users can concentrate on running their businesses instead of focusing on how to make their disparate systems work together."

The Fundamental Dilemma

Many SMBs may be suffering hangovers from their earlier, smaller days, when one or two people could effectively handle their data needs. As they grow and continue to use a combination of paper, spreadsheets and boxed small-business accounting applications to run their businesses, they may be unable to react quickly to changes in the market. Schiff points out, "They may have a piece of software to run financials, another to manage inventory and yet another to schedule work orders. Once their business begins to succeed and expand, these systems begin to fall apart or require significant manual intervention. Things change too quickly and communication simply breaks down." In short, no matter how much data some SMBs may have, it's of little use if it can't be easily accessed and aggregated.

The solution to issues such as these is often newer, more functional software and hardware. But because SMBs often operate under lean IT budgets—sometimes without fulltime IT staff—they typically can't afford to upgrade by increasing IT employees, adding new software and hardware or extending the time it might take to implement a large enterprise-type ERP application.

"The small business market struggles to work with the big ERP packages because, in many cases, the cost and time for implementation are excessive," Schiff

says. "For small businesses, the prospect of lengthy engagements that tie up their IT staff or that require hefty consulting fees—to say nothing of the risks of projects going off track—pretty much kept them out of that market. The fundamental dilemma is whether to buy the software they need now, but that won't grow with them, or to purchase full-function ERP solutions and resign themselves to paying for the implementations before they can realize the value of the investment."

Out
of the Box

Enter Peoplesoft World Express, a lower-cost and near-turnkey alternative to larger ERP applications. Running on IBM* @server iSeries* and @server i5 servers, it's a complete software and hardware package built for SMBs in the wholesale distribution, industrial manufacturing, construction and home-building industries. Companies in these industries can now purchase PeopleSoft World Express and

avoid the pitfalls of implementing a generic ERP-type application. In fact, the solution is designed to be up and running in an SMB environment with the standard configuration in an average of two months or less—as opposed to the year or more that a large enterprise might spend installing, configuring, testing and deploying ERP software.

The typical customers for PeopleSoft World Express are SMBs with revenues between $20 million and $100 million annually that are striving for low total cost of IT system ownership. While these numbers are surely nothing to sneeze at, they certainly don't compare to those of large enterprises, where revenues can reach into the billions of dollars. However, SMB companies can start with PeopleSoft World Express and grow into a billion-dollar company and the solution grows with them.

The solution grows with them because PeopleSoft World Express is based on PeopleSoft World's already well-proven architecture. In fact, there are more than 3,400 active PeopleSoft World customers. The two systems differ in configuration, however. While both PeopleSoft World and World Express share the same applications—such as accounts payable and receivable, inventory, sales order process, production planning and financial reporting, to name a few—PeopleSoft World Express is configured to support particular processes, depending on the industry. For example, if an industrial manufacturer wants to sell a product from inventory, particular steps integrated into PeopleSoft World

Express can facilitate that process—right out of the box.

PeopleSoft World Express is also designed for flexibility because businesses vary greatly even within the same industries. In addition, virtually all businesses need to make process changes to reflect changing demands. If a company has specific needs that are outside the scope of the basic PeopleSoft World Express offering, the software can be configured to accommodate them.

"Because PeopleSoft World Express has been set up to support the business processes of particular industries, we have a configuration we know will work. So if a customer is willing to work within those processes, the implementation is very straightforward. It's primarily a training and data acquisition effort," Schiff explains. "However, if they have certain, unique needs, the software can be configured easily to match those needs. The only

"The small business
packages
implementation are

additional cost would be for tailoring of the base solution."

Notably, changes can be made to the PeopleSoft World Express offering after it has gone live. If a customer finds that certain processes don't necessarily work in its environment, for example, those processes can be tailored to more closely match its desired business procedures any time after the software is implemented.

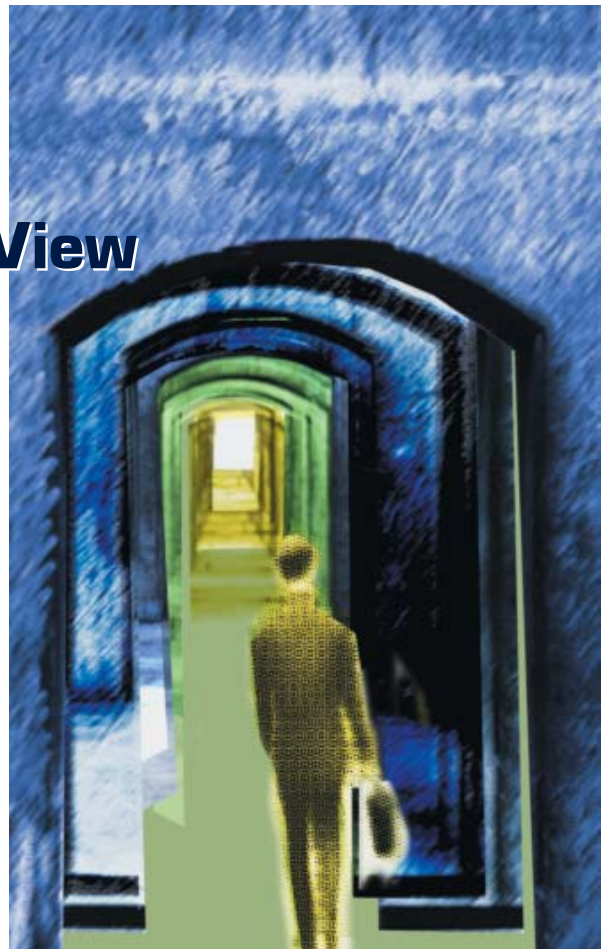### iSeries Integration:
A True Value

Because PeopleSoft World Express was written to run only on the IBM iSeries (and @server i5) server, it's tightly integrated with the platform's operating environment, which is well known

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for its scalability, reliability and security. "It's the combination of the two that truly creates the value here," Schiff says. "There are certain things the iSeries server has to offer that none of the other hardware platforms offers in terms of stability, robustness and reliability. And because we're writing to only one platform, we're writing to only one database and only one operating system. We know where everything is and how everything works, and we're absolutely confident that a certain operating system command will be right where it's supposed to be. There's no guessing."

This marriage of PeopleSoft World Express and the iSeries server is a natural fit, further bolstering the claim that World Express is easy to implement, configure and use. Because the iSeries server rarely has unplanned downtime and requires little administrative overhead, SMBs don't have to beef up their

A Better View

"PeopleSoft World Express is functional, affordable and reliable," Schiff says. And indeed, these benefits are what the offering running on iSeries provides. It can scale, for example, from five users to more than 10,000, growth that one PeopleSoft World customer has already achieved. This notion of scaling is particularly important for SMBs, which can deploy PeopleSoft World Express and forget about it. "They can make the decision to go with PeopleSoft World Express, get it running and then focus on other areas of the business, knowing that the software will sup-

market struggles to work with the big ERP because, in many cases, the cost and time for excessive." —John Schiff, director of product management, PeopleSoft World

IT staffs to manage the combined solution. Additionally, because the object-oriented iSeries is virus-resistant, it's a more secure platform on which to run a business. "We've never seen a virus in our PeopleSoft World and iSeries environment, which is very important for small businesses," Schiff says.

Few PeopleSoft World customers have fulltime IT staffs. Often, a manager of an operations department administers the environment. This creates a lean operating setting, with less expensive staffing overhead. In many cases, all that's needed is for someone to take the previous night's backup tapes to an offsite location and load the current tapes. "This system can be run with very, very little tending," Schiff says.

port them for any period in the foreseeable future," Schiff says.

And that, after all, is the purpose of any well-considered solution purchase. It should facilitate both current and future growth, almost forgotten but still working in the background. In some cases, it may even ease the burden on everyday business processes by automating formerly manual steps. It should also give decision-makers a better idea of their operations, creating at-a-glance views of data brought together from different aspects of the business. And it should be flexible

enough to change and scale as the business grows.

So it is with PeopleSoft World Express. "Customers for this offering will find it a worthwhile investment that can provide rapid return on investment, as well as the ability to grow and meet their expanding business needs on a secure and reliable platform," Schiff concludes. ■

Jim Utsler is a writer and editor who has been covering technology for more than a decade. Jim can be reached at jjutsler@provide.net.

Few PeopleSoft World customers have fulltime IT staffs. Often, a manager of an operations department administers the environment.

Unconventional Wisdom:

Look Beyond the Full Parking Lots | By Bob Tipton

I love these two words: Unconventional Wisdom. Unconventional–different, unexpected, not following the masses, uncommon. Great word. Wisdom–learning through experience, earned knowledge, a wise outlook, plan or course of action. Another great word. But add the two words together and you find something truly powerful–the potential for greatness. No question, the world is getting smaller and more competitive, the pressure for profits is relentless and even the smallest businesses are dealing with significantly complex business processes as they work to serve customers like Wal-Mart, the United States Department of Defense, etc. Smaller companies, in many ways, have big-company headaches crying out for sophisticated IT solutions. But what's a smaller company to do related to choosing the best possible option for their IT architecture and applications?

Conventional wisdom suggests that popular choices are safe choices. After all, if everyone else is doing it, then it must be right. Consider the last time you went out to eat in an unfamiliar city. Did you look purposely at the "full parking lots" as a primary predictor of a tasty meal? Or, instead, did you go searching for the best choice, by asking locals, reading the neighborhood paper or researching on the Internet? Clearly, my life is full of unconventional decision-making. I strive to find the unique, the valuable and the unexpected as I help my clients efficiently differentiate their business operations. Not long ago, I finished some research related to an unconventional approach (when compared to today's marketing messages) to deliver IT solutions to smaller businesses. Here's what I found.

PeopleSoft Compared to Microsoft

I was asked to perform a detailed comparison of the IBM* @server iSeries* server-based PeopleSoft* World Express product to competitive offerings from Microsoft* Business Solutions (Great Plains, Axapta and Navision). Now, you may think that's an unfair comparison. After all, the foundation of PeopleSoft World Express is 20 years old, and the popular press has considered the iSeries server to be dead or dying for years. Comparing an RPG-based, iSeries application to something from Microsoft? I can hear the "technology of the day" purists snickering from here. However, I was frankly amazed at how well PeopleSoft World Express stacked up. It met or beat the Microsoft competitors in almost every feature/function analysis. PeopleSoft World Express was the clear winner in many categories and PeopleSoft World Express was the overall winner in all of my aggregate comparisons. So much for the 20-year-old technology being too ancient to compete.

As I said, in an objective, aggregate feature/function 165-category analysis (all features and functions examined in total), PeopleSoft World Express rated the highest of all four applications: 1) Manufacturing-type companies (inventory, purchasing and manufacturing are priorities); 2) Service-type companies (no interest in manufacturing, little interest in inventory); 3) Customers where product architecture is a high priority (unlikely to be current-iSeries faithful; most likely a current Windows* or UNIX* user); and 4) Customers for whom product architecture isn't at all a priority. In fact, the detailed data showed that when including product technology (platform, architecture, server, database, user interface), PeopleSoft World Express scored "first or tied for first" in 69 percent of the total categories, and scored in first or second place more than 80 percent of the time. In addition, when excluding product technology (as current iSeries customers are more likely to do), PeopleSoft World

Express scored "first or tied for first" in 76 percent of the total categories and scored more than 84 percent in first or second place categories.
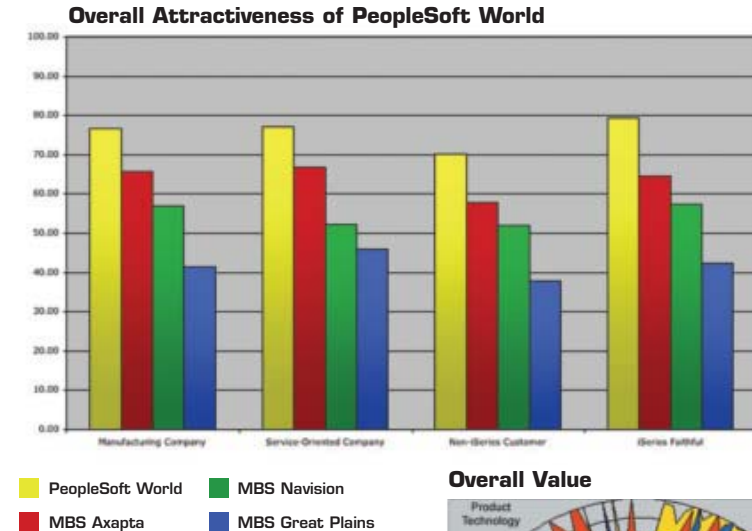
Next, when I looked more specifically at different categories, PeopleSoft World Express still did very well. PeopleSoft World Express was the clear winner in many categories and it was very strong in other categories, but in fairness, it also just "held its own" in some areas and there were some areas of concern when compared to the Microsoft offerings. Here's what a more granular analysis turned up related to PeopleSoft World Express.

Research findings

- **Very strong:** Financials (G/L, A/P, Fixed Assets, Cost Accounting, Cash Management, Budgeting, A/R, Financial Reporting, Project Accounting); Shop Floor; Production Planning; Product Data Management; Inventory Management and Purchasing Management
- **Holds its own:** Human Resources; Manufacturing Management and Sales Management
- **Potential concerns:** Personnel; Field Service and Repairs; CRM; Platform Independence (lack of database choice, lack of commodity-based server hardware – although, if done again, the @server i5 server pricing may significantly alter the outcome here) and User Interface.

Surprised? I was. I was prepared to say, "Well, you know, the PeopleSoft World platform really has lost its ability to compete." Instead, I discovered that a detailed, objective, feature/function comparison highlighted the currency of the PeopleSoft World Express offering, including its ability to meet and beat competitors from Microsoft. Sometimes 20 years of investment is a good thing, and PeopleSoft World Express is one such example.

Choose based on need

I guess the selection comes down to what a rational, informed small businessperson is looking for related to his or her enter-

prise resource planning (ERP) solution and overall IT architecture. Instead of running after a more popular choice without really doing your homework to see the issues, challenges and objective options, you'll sometimes find the right choice has been there for some time.

This seems like the current fascination with low-carb diets and the need for restaurants to respond by offering "carb-smart" menu choices. Unfortunately, too many low-carb dieters forget the calorie component to weight loss and ignore exercise altogether. Then, they wonder why they were unsuccessful in meeting their weight-loss goals. Losing weight (for all but a few) is the process of reducing calories while increasing metabolism. That's it!

Secret for small businesses

Similarly, because the iSeries server-based PeopleSoft World Express solution is unconventional (read, not the most popular choice in that there's no Microsoft required), it's also one of the best-kept secrets for the smaller business looking for powerful and affordable IT solutions. Additionally, the popular press, the billable-hours-hungry professional services firms and the you'll-need-all-sorts-of-additional-software vendors have little interest in recommending an iSeries server-based PeopleSoft World Express

Overall Attractiveness of PeopleSoft World

- PeopleSoft World
- MBS Axapta
- MBS Navision
- MBS Great Plains

Overall Value
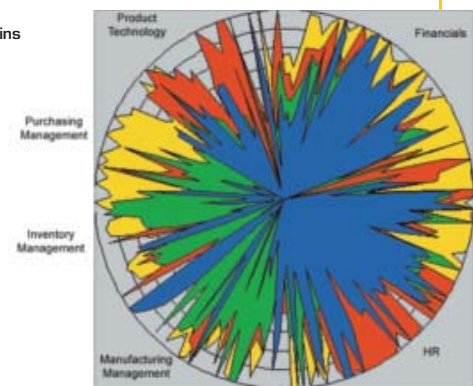
solution. They're like the weight-loss snake oil salespeople who told the market that low-carb is right, and then told us to buy their low-carb solutions.

However, just like a balanced diet with regular exercise leads to a healthy body shape, the integrated, secure, easy-to-own and feature-rich combination of the IBM iSeries platform and PeopleSoft World Express gives you a chance to deliver unconventional and wise results to a small business customer. Again, look past the full parking lots related to IT solutions, and do some research. You might just find a truly tasty treat off the beaten path—one with an iSeries server/PeopleSoft World Express flavor. For the unconventionally wise "gourmands" only. ∎

Robert Tipton is managing partner of R S Tipton, Inc., and a well-known thought leader in the IBM iSeries marketplace. Robert can be reached at tipton@rstipton.com.

Express *for* Success

PeopleSoft World Express puts small to medium businesses on the fast track

By Ryan Rhodes

The first Microsoft* Windows* computer I ever bought was in 1996, a Compaq Presario that cost me more than $3,000. It was a magnificent machine for its time, a computing dream that became pretty much obsolete within two years.

What perplexed me most about my Compaq was all of the applications that came bundled with it, featuring media playback devices and office programs that I certainly didn't need and most-assuredly didn't want. I had no need for spreadsheet and database applications—because these weren't required to play Command & Conquer—yet there they were, and I couldn't help but wonder how much all of those useless programs

factored in to the $3,000 system pricetag. Therefore, a few years later, I opted to build my own computer from scratch and install the software components of my choosing, creating a system that was uniquely mine and fit my personal computing needs. The price, not surprisingly, came down significantly.

Small- and medium-sized businesses (SMBs) routinely have to work through similar technology-buying experiences. There is certainly no shortage of business software solutions in the marketplace, but many of them are too complex and all-encompassing, and feature far more power and functionality than is required for a smaller business.

A company with only a couple dozen employees doesn't require a program that can process the salaries and compensations of 8,000 or more people, and it certainly doesn't want to have to pay for all that extra power. Therefore, software developers are often asked to provide a more SMB-friendly version of a popular offering, an alternative that is more finely tuned to the needs of smaller enterprises, which is where PeopleSoft* World Express comes in.

PeopleSoft World Express, one of the latest solutions brought to the market by Pleasanton, Calif.-based PeopleSoft, Inc., is tailored to the needs of the SMB marketplace, and is specifically designed to leverage the benefits of the IBM* @server iSeries* and @server i5 platforms. With PeopleSoft World Express on the iSeries server, companies can realize the performance enjoyed by larger enterprises but at a lower investment in dollars, personnel, space and expertise.

Like its bigger brother PeopleSoft World, the Express version is an enterprise resource planning (ERP) solution that helps facilitate the management of such business elements as plant operation, inventories, equipment, finances and employees, bringing all these disparate entities together as an integrated and synchronized whole.

To create PeopleSoft World Express, the developers at PeopleSoft called on the lessons they had learned during the company's history of implementing small and larger business solutions, keeping in mind that, although every business has unique needs, most share a similar set of core business practices, regardless of size.

"A lot of our competitors have brought out offerings that are pre-configured, which means that all of the switches are set and everything's done when you get it," says Carol Ptak, PeopleSoft, Vice President and Global Industry Executive, Manufacturing and Distribution Industries. "The problem with that approach, when you consider business rules, is that if those pre-configurations aren't how you run your business, then it comes down to expen-

sive modifications. With PeopleSoft World Express, you have a solution that has been somewhat implemented, but it's still highly configurable to business needs without incurring the expenses associated with modification."

Ptak stresses that PeopleSoft World Express is not simply a stripped down version of PeopleSoft World. Rather, it's a unique, industry-specific solution that caters to the ever-changing needs of smaller enterprises. And, it's not a pre-configured "do-it-this-way-only" solution. PeopleSoft World Express offers organizations have the flexibility to implement a software solution that fits their business needs uniquely. At the same time, they gain considerable adaptability. As business needs change, the software can adapt right alongside.

Because PeopleSoft World Express is

and attacks of that nature, the iSeries server just isn't. It's nearly bulletproof."

According to Ptak, the business benefits customers can expect by implementing PeopleSoft World Express include a deep level of industry specificity. This means that, rather than simply implementing standard business processes that may not be set up to optimally run, for example, a manufacturing plant or a distribution center, PeopleSoft World Express offers packaged recommendations so companies can implement business processes that are very specific to their individual industry. It can do this while also providing software tailored to the needs of smaller businesses.

"The benefit to companies is that they can implement the software more quickly, at a significantly lower cost, but still get a solution that uniquely fits their

"The iSeries server is one of the most reliable and secure servers manufactured today."

—Carol Ptak, PeopleSoft,
Vice President and Global Industry Executive,
Manufacturing and Distribution Industries

also tailored to run specifically on the iSeries server, it brings a level of reliability and performance that other ERP solutions can't achieve on their own. There's a personnel advantage to having an iSeries solution because companies buying PeopleSoft World and World Express typically have fewer than one person in IT. Therefore, they need a server that doesn't require a lot of systems administration, which is a hallmark of the iSeries server. Additionally, iSeries machines don't require a database administrator because the server performs database administration tasks automatically.

"You can run it on any server you want, so long as it's an iSeries server," says Ptak. "The iSeries server is one of the most reliable and secure servers manufactured today, so it's the perfect platform for PeopleSoft World and World Express. Both solutions only run on iSeries servers so they can exploit all the benefits of that server. Unlike some of the Intel* servers out there today that are subject to viruses

company," Ptak says. "It fits not only their industry, but also their business, allowing them to realize a faster time to value. That's an important benefit, because typically what happens with ERP software providers is that they do one of two things to address the needs of the small market. They either dumb down the software, or they pre-configure it. Both of those options are based on a belief that smaller companies are less complex than the big guys, and that's false. If anything, smaller companies are more complex, because they have fewer people doing a broader range of functions, so they need a fully featured software solution that is also configurable to the needs of their businesses. PeopleSoft World Express provides all that, I'd say, almost perfectly." ■

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PLOWING

If you're an IT manager, you no doubt heed executive directives to stay competitive by cutting costs and increasing customer value. This means taking a long look at the enterprise to see where resources can be reduced. But in a lean business environment, where do you look for waste?

Perhaps the biggest hardware and software waste in many enterprises today is manifest in the size of the data center. IT managers typically have an Intel* server farm with one server and one OS per application.

What if managers could consolidate all of these resources into one server that runs close to maximum capacity instead? The result would be a chief information officer's dream: drastically reduced costs and measurable improvements in IT business processes.

Some IT managers may find this scenario unbelievable, according to Ian Jarman, iSeries* product manager for IBM. "Many people don't trust putting a lot of complex business applications on one Intel server," he explains. Jarman is out to convince people that they can put them on one server, though not with Intel.

So how can IT managers consolidate a whole server farm into one server? Jarman's answer is the IBM* @**server** iSeries* family. iSeries servers can integrate Windows*, Linux* and UNIX* applications into one robust and very secure environment.

Built-in i5/OS* systems-management applications allow you to dynamically or automatically adjust server resources to fit your changing business needs. For example, your accounting system might only need to cut checks once per month. The system can automatically divert resources to cut the checks and return to other mission-critical processes after all of the checks have been cut.

Conventional wisdom directs IT managers to purchase the least expensive server. Jarman claims that another approach is needed to contain rising costs when the number of servers grows to unmanageable levels. "The typical installation has one application per server, which means a whole farm of servers," he says. "When you add up the costs of this setup in management and security, they can get out of hand pretty fast.

"But when you consolidate all the applications and operating systems into one server, your total costs go down dramatically," he adds. And over time, consultants have consistently pointed to the iSeries server's low total cost of ownership. For details, see the IBM Web site (www.ibm.com/iseries/literature/reports_papers.html).

The reasons for the low total cost of ownership and quick return on investment include hardware life cycles and server maintenance.

"Security is another big cost," says Jarman. "The OS/400* architecture is virus resistant; a file cannot become an application, which happens all the time with Windows* Trojan horse programs. A Windows virus under an iSeries server cannot infect iSeries applications or data."

If you run an Intel server farm, you know how much you spend annually on Windows security patch management. Not only is the iSeries server virus-resistant, but i5/OS and OS/400 have several built-in applications to automate Windows servers running in the Integrated xSeries* Server or Integrated xSeries Adapter.

Delivering value

Cost reduction in IT wasn't the main driver behind the initial development of the iSeries server or its predecessors, though it's a welcome byproduct. When the pre-cursor to the iSeries family emerged in the 1970s, the idea was to combine mainframe-class performance with unprecedented ease of use. To improve ease of use, engineers have been adding systems-management functionality—both automated and graphical—to what is now known as i5/OS for 30 years. The result is as close to "set-it-and-forget-it" as any server in the industry. The iSeries server even includes a "phone home" capability that notifies IBM Support without the customer even knowing about it should a problem occur.

"When people come to the iSeries server for the first time, they're most surprised by how many of the usual management tasks are automated,"
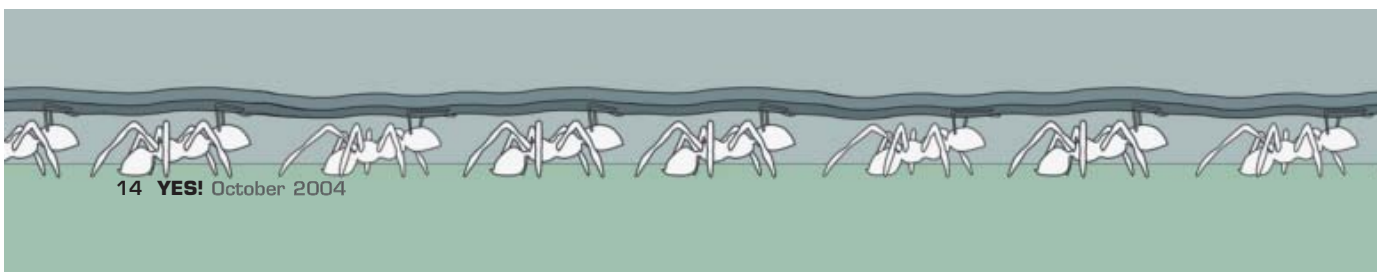
over Server Farms

By James Mathewson

One iSeries server can do the work of many Intel servers to improve enterprise total cost of ownership

Jarman says. "For example, iSeries servers automate storage management. Customers save time when they don't need to manually manage storage across a whole server farm."

Jarman says virtualization puts iSeries manageability in a whole new class. "While Microsoft* Corporation is just beginning to look at virtualization, the iSeries server has had forms of virtualization since the '80s."

Virtualization allows customers to dynamically or automatically adjust server resources as workloads demand. An example is logical partitioning (LPAR), which enhances server consolidation by letting a single processor behave as several processors, each doing the work of a different OS and set of applications. The most recent release of i5/OS has a feature called uncapped partitioning, which allows the server to automatically shift workloads when necessary. With Capacity on Demand, another virtualization technology, users can pay for capacity as activated. These and other virtualization technologies should result in simpler, more efficient server usage at lower costs.

Jarman says when customers discover that they no longer need server administrators to manage their server farms, they often can find business challenges for them, such as improving the customer experience on the corporate Web site.

"When IT managers can go to their CIOs and say 'I've cut costs and improved our ability to generate revenue,' they become very satisfied customers," he says. Indeed, VAR Business recently ranked the iSeries server number one in customer satisfaction.

The road map

The iSeries platform is outpacing the competition in new technologies, too. Jarman says while Intel and Microsoft are just beginning to develop viable technologies such as 64-bit computing and virtualization, the iSeries server already has mature and stable versions. "This stable road map is another differentiator for iSeries," he says.

"Customers know they won't need to recompile applications or do anything out of the ordinary to upgrade to future versions of iSeries; in many cases they'll have the same serial number on their servers.

"The clear upgrade path gives them the confidence to invest in iSeries," he adds. "And unlike Intel, iSeries hardware scales up to 64-way systems with very little loss of performance. iSeries servers feature binary compatibility with applications from the smallest to the largest businesses. So even if they run a small business, they will be able to run an iSeries server no matter how fast their business grows." ∎

James Mathewson is editor at large for ComputerUser magazine and an information developer and designer for IBM's Information Centers. James can be reached at jmath@us.ibm.com.

Key differentiators of iSeries over Intel:

- **Availability:** iSeries* servers are industry leaders in availability. Downtime isn't an issue for many iSeries customers.
- **Integration:** Few other operating environments integrate up to four types of operating systems with all of their applications into one machine. This allows customers to keep their existing applications and data together while improving security, performance and stability.
- **Scalability:** iSeries servers feature linear scaling up to a 64-way. This allows customers to run UNIX* and Windows* systems (via the Integrated xSeries* Adapter and Integrated xSeries Server features) on the same server.
- **Security:** OS/400* and i5/OS* are resistant to the effects of viruses because of their object-based architecture and easy-to-use security-management functions, which include digitally signing the OS itself.
- **Support:** iSeries customers consistently rave about the support they receive, including a "call home" feature that automatically dispatches a support person to their remote location in case of a problem, often without the customer knowing a problem even existed.
- **Virtualization:** Automatically maximizes server utilization and can lower costs dynamically. —J.M.
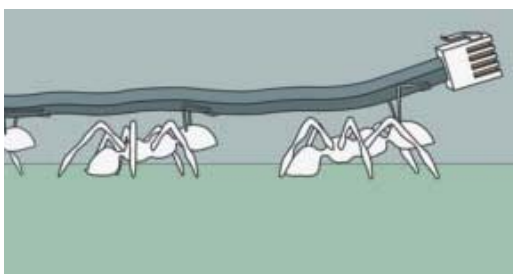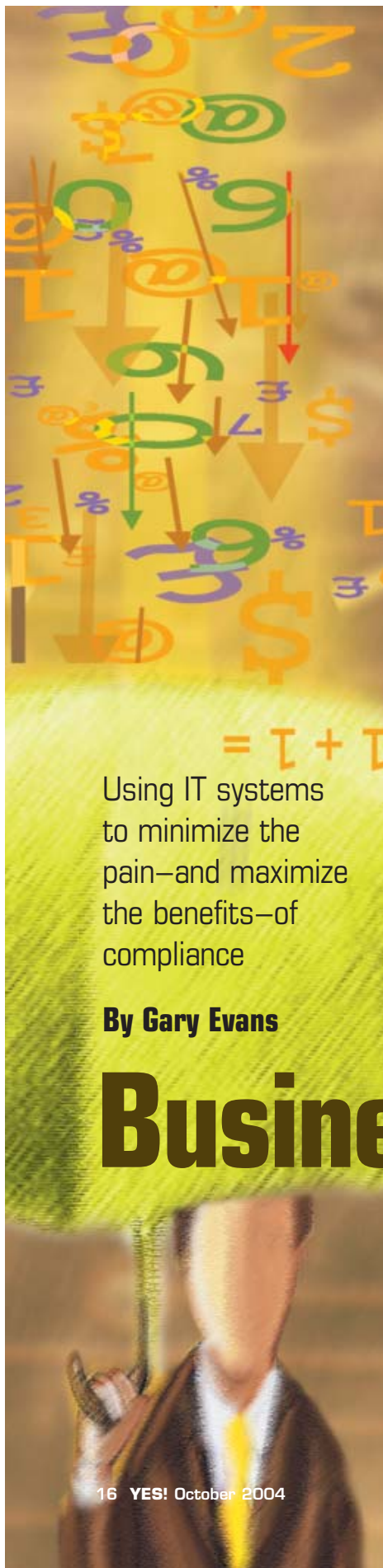
Using IT systems to minimize the pain—and maximize the benefits—of compliance

By Gary Evans

Business after Sarban

The entire business world has changed since Enron declared bankruptcy late in 2001. This event and others that followed focused national attention—and new legislation—on financial reporting and corporate accountability. The Sarbanes-Oxley (SOX) Act of 2002, a direct result of these events, is perhaps the most sweeping corporate reform legislation since President Franklin Delano Roosevelt's New Deal of the 1930s. By insisting on controlled, audited financial systems—and real-time disclosure of material changes to these systems—the business world demands a degree of accountability most companies are unprepared to accommodate.

As a result, last year CFO.com ranked SOX-compliance issues as the top business challenge faced by companies[1]. Not surprisingly, in a recent survey, 86 percent of the businesses polled were either evaluating or implementing systems to deliver on this legislation[2]. But it's a challenge. The legislation is still evolving and clear systems for compliance are only just emerging. The bright side is that the detail and clarity demanded by the act ultimately work to a company's benefit. In the same survey, 65 percent of companies reported that they planned on leveraging initiatives related to SOX to achieve process improvements aimed at increasing business efficiencies. The new legislation forces companies to create better documented, more efficient con-

trol systems, and these can only aid a business in terms of long-term health and flexibility.

The most popular system for compliance—the one backed by the Securities and Exchange Commission (SEC)—is based on the Committee of Sponsoring Organizations (COSO) of the Treadway Commission. Most organizations have

accepted this as the most viable model for compliance. Sue Brown, PeopleSoft* World product manager, says, "COSO has become one of the foundations upon which compliance solutions, including software solutions, are built."

Working Within the System

COSO lays out five conditions fundamental to an effective compliance system.

Risk Assessment

Simply put, risk assessment is the ability to evaluate the factors that affect an organization, particularly with regard to operational, financial, regulatory and compliance risk. It includes identifying threats and analyzing their potential impacts.

Control Environment

COSO recommendations require companies to create an environment conducive to a strict internal control-system, helping ensure issues are handled consistently based on structure and discipline.

Control Activities

Beyond just creating a secure-control environment, COSO advises companies to adopt policies and procedures that help ensure that any actions identified to manage risk are executed in a timely manner. This includes ensuring appropriate action is taken and placing controls within business processes.

Information and Communications

Information and communications systems are necessary to help ensure that relevant information is identified and communicated among appropriate parties in a timely manner. Examples include standardizing communication systems among employees at all levels of a company, regulators, shareholders and partners.

www.peoplesoft.com

Monitoring

To comply with SOX and COSO, companies must have their internal controls routinely evaluated by outside parties. These auditors are responsible for validating the quality of the system on an ongoing basis.

As Brown points out, "There are specific combinations of actions that need to occur to help companies comply with Sarbanes-Oxley. And beyond understanding what these actions are, companies need the tools to help organize their activities and fulfill their requirements."

With a Little Help From My Software

Compliance Week reported late in 2003 that "the list of companies confessing to the SEC and the public that their external auditors think their internal controls have 'material weaknesses' is significant, and continues to grow in December filings with the SEC[3]."

This isn't surprising because even with COSO as a blueprint, compliance issues still tend to be overwhelming. Says Brown, "Companies are still trying to determine how to build programs that leverage existing frameworks." Fortunately, these issues aren't completely new—in many ways they're just enforcing recognized best practices. Already, software exists to help businesses implement and enforce effective control systems. Software specific to SOX requirements is just around the corner. "Products like PeopleSoft World

1es - Oxley

will deliver the software that businesses need to enable compliance," Brown says.

PeopleSoft World (formerly known as J.D. Edwards WorldSoftware) is a host-centric product line and a leading solution for the IBM* iSeries* platform. It facilitates the management of plants, inventories, equipment, finances and people as a synchronized,

integrated whole. In other words, it's designed to provide the degree of centralization and control necessary for businesses to implement and automate control processes critical to compliance. It offers several capabilities that help deliver on COSO guidelines:

System-based Internal Controls

PeopleSoft World creates a framework where systems-based controls can be mapped to software functionality and control points. In other words, internal controls are automated, thereby simplifying data control flow. Additionally, it has more than 1,100 built-in system-based control opportunities, including integrated postings to the general ledger, systems constants, processing options, application security, integrity reports and audit reports.

Automated Processes

Process automation helps ensure consistency and control. The software comes with hundreds of standardized business processes based on industry best practices. These allow companies to create their own processes, either by customizing the pre-built ones or by using them as models to build their own from the ground up.

Consistent Documentation

As part of the PeopleSoft World enhancements designed to meet SOX requirements, the new Process Modeler will contain more than 500 best practice business processes. These will be easy to modify to accommodate a company's unique way of doing business.

"The secret for companies as they move toward Sarbanes-Oxley compliance is to take advantage of the tools built specifically to do the job at hand. That's exactly what PeopleSoft World will offer."

—Sue Brown, PeopleSoft World product manager

Ongoing Control and Monitoring

To help companies identify SOX-required compliance exceptions, PeopleSoft World will provide the ability to monitor authority changes for:

- Accounts receivable write-offs
- Customer credit limits
- Accounts receivable aging
- Segregation of duties for address book and accounts payable
- Duplicate invoice checking
- Out-of-balance general entries and posting
- User authority within PeopleSoft World

It sounds like a lot to keep track of, and it is—no one said compliance was painless. However, it helps to remember that compliance is designed to make companies smarter and more efficient—if they control how it impacts their business instead of letting it overwhelm them. As Brown points out, "the secret for companies as they move toward Sarbanes-Oxley compliance is to take advantage of the tools built specifically to do the job at hand. That's exactly what PeopleSoft World will offer." ■

Gary Evans has been chronicling technology's impact on business and the world for several years. A self-styled "technology-to-English" translator, his background is in writing and training. Gary can be reached at gevans@saysocommunications.com.

1. "CFOs Top Challenge? Uncle Sam" CFO.com, March 25, 2003 used in PeopleSoft EnterpriseOne and Compliance: A discussion of Solutions for Sarbanes-Oxley and Other Compliance Requirements

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3. "Will Crammin for SOX 404 Exams Be Enough to Pass the Grade?" Compliance Week, January 13, 2004. Used in PeopleSoft EnterpriseOne and Compliance: A discussion of Solutions for Sarbanes-Oxley and Other Compliance Requirements

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Tools For Bending Integrates its Business Processes with the Guidance of MSS Technologies and PeopleSoft World

CHALLENGE

Tools For Bending (TFB) is the industry leader in the manufacture of tooling required to properly bend tubes, extrusions and other materials and wants to remain on top. Current business processes were not in line with that goal.

Manufacturing highly configurable heavy metal products that require engineering review can be a challenge. Having manual processes using paper and pencil for the initial quote and the completed quote being typed by hand took a considerable amount of manpower. Critical issues of incompatibility, processes, special requirements and pricing relied heavily on "tribal knowledge."

"Late orders were our biggest issue," states Eric Stange, President. There was no visibility to aggregate shop load or material requirements, resulting in unrealistic order promise dates.

If TFB continued to operate under these conditions their market leadership position was in jeopardy.

MORE DETAILS

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(877) 677-4636
(602) 387-2197
express@msstech.com
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SOLUTION

Tools For Bending knew it needed help to resolve its issues, so a search was conducted for potential partners and products that could meet its needs. After MSS Technologies painted a picture using the PeopleSoft World product, the vision was realized.

TFB was the first channel business customer to acquire PeopleSoft World in 1995.

Using the PeopleSoft Configurator and MSS Technologies' knowledge of manufacturing, TFB is able to meet the individual requirements of every customer.

With an unlimited number of potential end item configurations, TFB would have hundreds of thousands of bills of materials. This need was eliminated using the PeopleSoft World Configurator.

To accurately quote a potential order you must have a solid foundation. Accurate bills of material and routing definitions are imperative. TFB's Configurator calculates materials, components, routing steps, prices and cost for each unique requirement within seconds of order entry as well as editing for incompatible attributes.

The Configurator dynamically creates a custom Bill of Material for each item. The ability to calculate quantities of unique materials and components along with their individual costs "on the fly" is a huge benefit. This ability saves time, improves consistency for price and characteristics and can be used for other customer orders.

Accounting for cost and profitability of each job is made easy with the front and back office integration. Decisions on lot sizing and stock quantities are made using all the right factors.

Requirements planning for material purchases has integrated and optimized the procurement of only what is needed when it is required. Once the material arrives it is issued to the shop which utilizes dispatching for all work centers and now provides the visibility to track orders. Orders are consolidated for shipment at the end of processing.

The promise dates quoted to customers are based on current load of required resources utilizing a daily report. The report writer has proved an invaluable tool contributing to major improvements in on time delivery performance.

"The benefits of the resulting improved relationships with our customers are immeasurable," says Stanley Flickinger, Secretary/Treasurer.

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Toppan Interamerica Achieves Success with World and iSeries Solution

CHALLENGE

Toppan Printing Company was founded in Tokyo, Japan in 1900. Toppan Interamerica Inc. (TIA) was established in historic McDonough, Georgia in 1988.

Toppan Interamerica provides North and South America with the finest quality decorative papers in the world. Toppan produces an infinite number of designs for the laminating industry as well as specialty foils and films. The company emphasizes personal service and responsiveness and its goal is to provide unsurpassed customer satisfaction.

Toppan is proud to bring its rich printing heritage, global design leadership and a century's worth of knowledge and dedication to the American marketplace.

Detailed analysis of Toppan's IT infrastructure began with confirmation that its legacy systems were Y2K compliant. Jay Verenakis, Toppan IT Manager, indicated that once that bridge was crossed, decisions had to be made as to what infrastructure would support the growth that the company had forecast for the coming years. Key criteria were:

- Maintain iSeries hardware as foundation for any new software, based upon its solid performance and cost-effective history
- Form software foundation that had solid financial transaction and reporting capabilities
- Integrate distribution transactions seamlessly into financial foundation
- Enable SCADA manufacturing functionality to be added when needed
- Allow potential integration of third-party products for niche applications

SOLUTION

In addition to the technical and functional requirements that Toppan had, going forward it was looking for local support and a scalable solution. It had a relatively small support staff, and needed both hardware and software platforms that were extremely reliable, as well as having the ability to keep up with strong business growth plans.

The PeopleSoft (formerly J.D. Edwards) World software solution fit all of its requirements perfectly. World financials were well known for their stability, solid performance and scalability. The integrated World Distribution Suite, which includes functionality for Sales Order Processing, Inventory Management and Procurement Management, was also implemented. It merged seamlessly into the established World Financial foundation.

CD Group provided the software and consulting support that Toppan required to manage its project to completion. Work continues at the present time as both CD Group and Toppan are implementing the manufacturing functionality.

BENEFITS REALIZED

Implementation of the World solution enabled Toppan to meet its primary objectives of:
- Establishing an IT foundation that could scale with its growth
- Utilize the iSeries and its strong track record of performance
- Integrate financials, distribution, manufacturing and third-party functionality into one enterprise-wide system
- Implementing a system that all users were comfortable with; from transactional processing to management reporting

In the future Jay indicated that the need to assimilate complex inventory tracking methods and multiple distribution centers would be added to the company's IT demands. He feels comfortable that the foundation they have built around the PeopleSoft World and iSeries combined solution will face that challenge.

MORE DETAILS

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*Allow CD Group to review with you the possibilities of operating your business on a PeopleSoft World Express platform. You may attend one of our monthly World Express solution webcasts by enrolling via our website at **www.cdgroup.com**. You may also call CD Group at **1-888-CDGROUP** and an account representative will follow up with you.*

PeopleSoft World
Users Speak Up

"**Since** implementing **PeopleSoft* World** in 1997, we've largely been able to avoid custom **programming**. That's a big **advantage** for us. As a result, we've been able to reduce our contract programming **costs**."

Diane Edes, IS manager,
Gary Williams Energy Corporation

"World software has long maintained a well-earned reputation for **quality** and reliability. The recent enhancements provide a **modern** user interface that will dramatically increase user **productivity."**

Dave Hyzy, director of IT,
Benderson Development Corporation
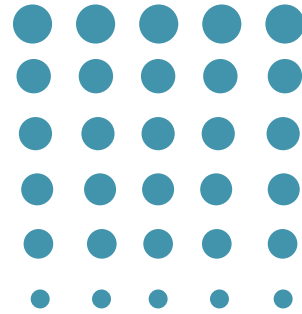
"**We have been on World since 1995**. In that time we have doubled our revenue and become more profitable. We run virtually all modules, generally with little or no modifications to the code. The software has proven to be flexible and robust and grows with our needs.

"In addition, World running on the **iSeries* has proven** to be virtually bullet-proof. I don't keep stats, because they would be boring, but we have basically been up 99.999 percent over the last nine years, except for the occasional day or so when we move to a new box. The software is real solid—I have **never regretted** my decision. I have never had a bad cume or patch, or had to undo anything I have applied. I have also found that there has not been a single mistake that staff has made that can't be fixed. That gives my staff a lot of **confidence and courage** to experiment."

**David Bryant, chief financial officer,
Maxco Supply, Inc.**

"PeopleSoft World provides a stable, low-cost alternative for meeting the business and financial needs of our company. Because PeopleSoft World runs on iSeries*, we have a minimal number of operations-support staff and they rarely have issues concerning performance and reliability."

Bill Tritch, product manager, Cargill

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