

## Meeting Minutes

<b>Meeting Title:</b>	BG@100 Executive Steering Committee (ESC) Meeting
<b>Date:</b>	February 28, 2005
<b>Time:</b>	11:00 AM ET
<b>Location:</b>	McFall Chart Room

### Invitees/Attendees (\* in attendance, # absent, + substitute, = by conference call)

Names			
*	Bruce Petryshak	*	Ben Santelman
*	Linda Dobb	*	Rich Nero, PeopleSoft
*	Chris Dalton	*	Tony Buckalew, Oracle
*	Ron Lancaster	*	Ginny Pinkelman
#	Bahram Hatefi		
*	Cindy Fuller		
*	Toby Singer		

**Bruce Petryshak** called the meeting to order at 11:00 AM and introduced guests, **Rich Nero**, PeopleSoft Account Executive and **Tony Buckalew**, Director Eastern Region Applications Team, Oracle. Bruce informed those in attendance that the agenda for today's meeting would be the presentation of questions from the Executive Steering Committee members and questions gathered from the BGSU user community for the two guests. Bruce provided written copies of questions that had been previously submitted by the BG@100 Project Team; Bruce Petryshak; Nancy Colzman, Bursar; and Laura Waggoner, Interim Registrar.

**Bruce** asked **Rich** and **Tony** to speak briefly regarding the purchase of PeopleSoft by Oracle and to share their view of the general direction the company would be taking. This overview would be the basis for a question and answer period that would follow.

**Tony Buckalew** began by stating that he expected the integration of the two companies to be final within the next 30 days. Prior to the merger, Oracle had 75 higher education applications customers, with the addition of the PeopleSoft customer base, that number is now 875 higher education applications customers. Oracle has retained 90% of the PeopleSoft development and support staffs. Their goal is to combine products and look at future functionality of all modules. Work is underway on this combined product line and the combined product suite is being referred to as Project Fusion. The idea is to deliver more for the clients and support existing customers. Support for PeopleSoft 9 will continue through 2013, with support provided 3 years after that date and probably beyond. **Tony** stated that they would not abandon customers.

**Tony Buckalew** continued by advising that the plan is for the first citing of Project Fusion to be in 2008 with limited modules. These few modules will incorporate the new architecture on which the remaining modules would also be built. The Financials, Student Information System and Human Capital Management modules will be developed later due to the magnitude and complexity of the modules. The hope is for this architecture to be available by 2010-2011. It is anticipated that sites using older

applications versions would convert first and those on newer versions of the Business Suite, PeopleSoft 9 and JD Edwards to then follow.

**Tony Buckalew** stated that he would like to share a question that **Bruce** had asked earlier, which is why continue by implementing PeopleSoft financials rather than Oracle financials? **Tony** advised that they support the single application approach. He cited interface and functionality as the two reasons for his recommendation that our implementation continue with PeopleSoft financials. He proceeded by suggesting that it would be at least seven or more years prior to the possibility that we would be ready to upgrade to the Fusion product.

**Bruce Petryshak** next asked questions to **Rich** and **Tony** from the listing of submitted questions.

*Submitted Question #1 - It is estimated we will "go live" in 2009. Since PeopleSoft will only be supported until 2013, will we be expected to turn around 4 years later and implement the Oracle product?*

**Rich Nero** advised that the Project Fusion team was previously in place at PeopleSoft and was being led by **Jesper Anderson**. When Oracle acquired PeopleSoft they asked **Jesper** to oversee the applications strategy team planning the combined product suite. **Rich** advised that they are supporting the PeopleSoft product lines until at least 2013. **Rich** advised that Project Fusion going live in 2008 with limited modules provides years of support on PeopleSoft 9.0. The Project Fusion product may be available in a limited form, and it would be some time after the larger modules are available. It would be advisable to see how implementation proceeds at other universities prior to proceeding with our own implementation. Moving to the Project Fusion product would proceed at our pace based on this information. **Tony Buckalew** emphasized it is about the new combined company and they are going to provide support and not jeopardize the investment.

*Submitted Question #2 – How soon will the Oracle product be available?*

**Rich Nero** advised Project Fusion is not the Oracle or PeopleSoft project it is a combination moving forward. **Rich** said it is difficult to provide a definite date at this time, but currently it is expected to first appear in 2008 with limited modules.

*Submitted Question #3 – Will there be a merger of the two products?*

**Rich Nero** advised yes, Project Fusion is the right investment for customers. Their goal is to become the dominant leader in the field by providing the best product.

*Submitted Question #4 – What expertise do you have in developing a student system product?*

**Tony Buckalew** advised those present that **John Wookey** is overseeing the development of the Oracle student system. They are extending support on PeopleSoft portfolio and want customers to feel comfortable in their directions and see a lot of support. **Bruce** questioned account management. **Tony** advised the Oracle team is totally dedicated to higher education. They cross-pollinated the PeopleSoft and Oracle teams to focus hard and deliver value each day.

*Submitted Question 5 – Will you use Beta Sites as you design this new product? If so, whom?*

**Rich** advised they have always used PAGs (Higher Education Product Advisory Groups) and HEUGs (Higher Education User Group). He anticipates that they will continue to use these groups although some names may change. **Rich** pointed out that the higher education user group remains the highest user group within the company. **Tony** advised there would be beta sites for the project.

**Linda Dobb** asked about time lines. We will be finishing the human resources phase in June and finance and student systems will follow. **Linda** asked, if it was recommended that we wait for the Fusion product in 2008, and will the Fusion product interface with the platforms that we have or migrate with them? **Tony** advised that Fusion will just start to appear in the market in 2008 and currently there is no set project plan as to when human resources, finance or student will become a Fusion product. The first step for them is to set the architecture of Fusion and that process began about a month ago. The student system is the largest module and when asked by **Bruce** to estimate a first release date for student, **Tony** estimated 2012 as the first release of the student module. **Tony** stated that he believes the smartest thing for us to do is to stay the course with the current systems.

**Ron Lancaster** expressed concerns about moving from legacy to PeopleSoft then to Fusion. He asked if there would be a conversion program to aid in making the transition. **Tony** advised they are writing conversion programs to take the Oracle and PeopleSoft forward. Not doing so would open themselves up to competitors. There is a heavy investment in the tools approach that can make the conversions simple. **Tony** believes there is value going from legacy to the next generation platform due to lots of self-service and cost reductions going into this new environment. **Tony** strongly suggests and believes it makes sense to continue forward because the same investments would have been made at Oracle and PeopleSoft. They are accelerating the process due to increasing the developers on staff, which allows them to deliver a product more quickly.

In the interest of time, **Bruce Petryshak** opened the floor for an opportunity for the ESC members to ask their questions. He indicated that it would be appreciated if **Rich** and **Tony** would provide written answers to the remaining submitted questions.

**Linda Dobb** stated a decision needs to be made whether we should move forward with installation of finance. **Tony** feels it is compelling to continue down the path of installing PeopleSoft Finance rather than implementing two different user interfaces. He further stated that he felt the functionality to be gained from installing now and having the added functionality until 2013 would outweigh concerns and be cost effective.

**Ron Lancaster** expressed concern as to whether Oracle or PeopleSoft is superior in financials. He also expressed concern regarding the chart of accounts. **Tony** stated Oracle's strength is in the financials and PeopleSoft's strength is human resources. When the PeopleSoft and Oracle products were compared, it was found that there were no compelling differences in terms of functionality.

**Bruce** stated that our current vendor moved away from supporting the higher education market. **Bruce** asked if **Tony** and **Rich** know if Oracle feels that the higher education space is strategic? **Tony** advised the second largest product development team was the student market. They invested significant dollars to bring it to market. There is a focus and commitment to higher education.

**Ron** stated that at the time of contracting with PeopleSoft, other functionalities such as data imaging and data warehousing were desired. Are those partnerships still valid? Is our data warehouse a 3<sup>rd</sup> party warehouse? **Rich** advised yes, they are still in place and they are moving forward in developing relationships with Oracle. **Bruce** stated the data warehouse was from PeopleSoft. Any tools for the data warehouse will be 3<sup>rd</sup> party.

**Ben Santleman** inquired about PeopleSoft 9 and advice for clients who need to do long range planning? Would there be an application point at which PeopleSoft customers need to be in order to make the transition to Fusion or would multiple paths be available? **Tony** advised that initially there will be multiple paths available. They anticipate advising current customers to upgrade to PeopleSoft 9 to be in a good position to make the transition. They realize not all customers will be at that point at the time of the transition. **Bruce** asked if there would be a toolkit available and would we need to be on a certain release? **Tony** advises keeping current on all releases and updates. It is likely that there will be a minimum standard for customers to be on prior to transitioning – keeping current throughout the use of version 9 is the recommended best path to use in preparation for the transition.

**Linda** asked if Oracle/PeopleSoft would continue to license PeopleSoft products? **Rich** replied, yes.

**Linda** asked if Oracle/PeopleSoft will resume the web broadcast updates and continue PeopleSoft training. **Rich** and **Tony** both answered, yes. **Tony** stated Oracle is very focused on making sure they support all three product families.

**Ron** asked about article regarding a 2 % difference in how Oracle and PeopleSoft bill maintenance fees. **Tony** advised the standard business practices at Oracle are higher than PeopleSoft. Existing customers will be treated correctly and fairly by their contracts. New acquisition customers will be under the business process with Oracle.

**Bruce** asked about plans for continuing sales of both product lines. Do they see a phase out of either product line? **Tony** stated they will continue selling both portfolios. They want to increase their client base on both lines and they will continue to sell where appropriate the PeopleSoft product and where appropriate, the Oracle product.

**Chris Dalton** asked what the combined higher education market is for the two sides. **Tony** advised the data base business remains over \$100 million dollars. **Rich** advised the PeopleSoft business is almost \$300 million dollars.

Further discussion follows as **Ron** shared comments he had heard regarding concerns for the move to PeopleSoft student. **Rich** offered to, at a future time, to do a product demonstration and answer questions. **Bruce** stated this would be something for future consideration when we enter into fitgap analysis for student. **Rich** also offered, for future consideration, to present and answer questions regarding security.

**Rich** and **Tony** provided a copy of the Oracle/PeopleSoft 2005 Executive Fact Sheet, see attached document.

**Bruce** wrapped up the meeting by thanking **Rich** and **Tony** for attending and answering questions. He stated that their written answers to the contributed questions would be appreciated.

**Bruce** adjourned the meeting at 12:20 PM.

<b>Next Meeting Date:</b>	March 14, 2005, 11:00-12:00 AM ET
<b>Next Meeting Location:</b>	McFall Chart Room
<b>Minutes Prepared by:</b>	Ginny Pinkelman