



PeopleSoft®

# *PeopleSoft8 For IBM Servers*

Sizing and Planning Questionnaire  
IBM Techline ISV Solution Sizing Center  
1-800-IBM-0222

When completed, please  
Send electronically to [eSizings@us.ibm.com](mailto:eSizings@us.ibm.com)

Or

Fax to:  
1-845-491-2372

**May 8, 2003**

*New version update every 60 days*

Please use this document to collect sizing input information for PeopleSoft applications on IBM platforms. Direct questions regarding this questionnaire to the IBM Techline ISV Sizing Center.

A sizing estimate is an approximation of the hardware resources required to support an ERP implementation. It is a pre-sales effort based on information available at a point in time, providing an entry into understanding the customer's hardware requirements. Customers' actual experiences will vary from the sizing estimate for many reasons, including batch and reporting workloads, and custom code. The degree of variability can range from small to very significant. IBM assumes no liability for actual results that differ from the sizing estimate.

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# Letter of Understanding

Dear Customer:

Thank you for requesting a sizing estimate for your IBM-PeopleSoft implementation. As one of PeopleSoft's leading alliance partners, IBM can provide the total infrastructure required to implement your PeopleSoft solution including hardware, software, middleware, services and financing. By following this highly successful, proven sizing process, IBM can recommend an infrastructure that can meet your needs today as well as grow with you in the future. The output consists of a customized approximation of the hardware resources (processor, memory, and disk space) required to support your PeopleSoft applications. Please note: the accuracy of the sizing estimate is highly dependent upon the accuracy and completeness of the responses in this questionnaire. To ensure this process goes as smoothly as possible, we offer the following suggestions:

- 1) To receive the best possible results, please consult members of your organization that are knowledgeable in the areas affected by the PeopleSoft products you are considering. They will probably have the best view of how your company will use these applications and will be able to answer many of the questions asked in this document. This will ensure that the document is complete and accurately reflects your company's environment. It is also recommended that you contact your local IBM representative, who will review the questionnaire input and will help you incorporate the output into your overall project plan. If you need assistance in contacting your IBM representative please send an e-mail to [psft@us.ibm.com](mailto:psft@us.ibm.com).
- 2) As you proceed in your evaluation, it is vital that all affected business units, information technology departments, end users and decision makers are made aware of and are in agreement with your goals and objectives. We have found that the most successful implementations are those where planning and teamwork are given the highest priorities.
- 3) We recognize that it may be difficult to provide exact numbers on many of these questions. A sizing estimate is based upon information available at a particular point in time and is subject to change. As your implementation progresses, new data unique to your implementation will become available. At that time you will find it advantageous to revisit the sizing process. In fact, both IBM and PeopleSoft recommend that customers re-size their PeopleSoft environments at least three times during their project cycle:

- Early in the project planning phase
- After implementation
- During testing as required when workload parameters change

Thank you for considering an IBM-PeopleSoft solution. If you have any questions or need help completing this questionnaire, please contact us at 1-800-IBM-0222.

Thank you!  
IBM

Company Information:

Company Name:	
Street Address:	
City, State Zip	
Contact Person:	
Phone Number:	
Email address:	
FAX Number:	
Industry:	
Other Vendors:	
IBM Client Rep:	
Phone Number:	
Email address:	
IBM Product Specialist:	
Phone Number:	
Email address:	
PeopleSoft Partner:	
Phone Number:	
Email address:	
OMSYS Number: (completed by IBM)	

## Suggestions for completing this document:

This document is composed of four sections or parts. Part 1 - Platform Selection, asks for the PeopleSoft Release level, server types and Database software product that is planned and will be used for this sizing solution. Part 2 – System Configuration, is used to assist in designing the desired system configuration for your IBM-PeopleSoft system. Part 3 – Production Sizing Inputs, is used to estimate the size and number of IBM processors, memory and disk needed to support PeopleSoft on-line users and application batch processing. Part 4 - Application Modules, is where you can select the specific module functions relative to this sizing request. The following terms and instructions will help you answer the questions appropriately. Please ensure you have the latest version of the sizing questionnaire. The questionnaire is updated periodically and the version is noted on the cover page. To obtain an electronic copy of the questionnaire, go to [www.ibm.com/erp/sizing](http://www.ibm.com/erp/sizing) or send a request to the IBM Techline ISV Solution Sizing Center at [esizings@us.ibm.com](mailto:esizings@us.ibm.com).

- **NEW WORKLOAD** - The detailed description of user counts and batch application jobs that are found in Part 3 are for new workloads only. This includes adding additional PeopleSoft applications. Please do not include a description of user counts and batch application jobs information for currently running workloads. See ‘Existing Workload’ bullet below.

**Total Named Users (New Workload only)** - The total number of “named” users that have a logon id to access the PeopleSoft application. This is potentially everyone that could sign on to the PeopleSoft application. This pertains to new workload only.

**Total Concurrently Active Users** – The Total Concurrently Active Users is a subset of the Total Named Users and is the maximum number of users during a one-hour period that are logged on to a specific PeopleSoft application and actively doing work. The one-hour period should be the time of day when you have the most user activity. This is considered the peak hour. It is important that no single person be counted twice. For instance, a user may be logged on to the Accounts Payable and Purchasing applications at the same time. Please count them once in the application that they use the majority of the time during the peak hour.

**Logged on Users** – A user that logs on to an application but never submits any transactions (updates or requests via PeopleSoft’s interface) is not an active concurrent user.

**User Type** – Different users will affect the processing requirements based on their type of work (application) and their intensity. To distinguish the type of active concurrent user for each application, use the designation of HEAVY, MODERATE, or LIGHT and the transaction rate listed below. Transaction rates are based on PeopleSoft’s standard definition of a moderate workload.

- **Heavy User** - a user whose principal job requirement is to enter, request and update data. They submit transactions frequently. This type of user is sometimes referred to as a “power user” operating in a “heads down” data entry or update mode.
- **Moderate User** - a user that enters data, requests data and updates the database regularly but their requirements are not as intense as those of a heavy user. You may consider a moderate user workload is half as much as a heavy user workload.
- **Light User** - a user that submits PeopleSoft requests or updates infrequently.

- **EXISTING WORKLOAD** - If you are already running PeopleSoft, we need to know what that configuration is. A table is provided in section 1.3 to describe that system.

**Capacity Planning** - It is assumed that this sizing request is for an estimate of IBM systems that will run new PeopleSoft applications in your organization or adding incremental users to existing applications. The request is defined as a “new pre-sales sizing request”. If you already have an existing IBM system running PeopleSoft applications and you would like to add more users or batch application work, you need capacity planning assistance. Please contact your eServer Sales Specialist. For zSeries capacity planning, please contact IBM Techline at 888-426-5525.

- **SWITCHING WORKLOAD PLATFORM** - If you are considering switching your PeopleSoft applications from another vendor to IBM, please contact your IBM eServer Sales Specialist because additional information will be required about your environment.

## PART 1: Platform Selection

### 1.1 Please indicate the desired PeopleSoft release to be used for this sizing

PeopleSoft Release	___ 8.x	___ 8.4	___ 8.8
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### 1.2 Please indicate the desired Server platform and Database product to be used for this sizing - Required

Database Server	___ pSeries	___ xSeries	___ zSeries
Application Server	___ pSeries	___ xSeries	
Web Server	___ pSeries	___ xSeries	
Database	___ DB2	___ Oracle	___ Other

### 1.3 Do you plan to run a new workload on a currently installed PeopleSoft production system?

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 1.3.1 When PeopleSoft applications are currently installed at your company on a production system and you plan to migrate from PeopleSoft 7.x and / or add new workload to this system, tell us about the the existing configuration in the table below - Required

	Database Server	Application Server	Web Server	Batch Server	Report Server	Non-Production Server(s)
Vendor/Model e.g. IBM / pSeries 690						
No. of processors/speed e.g. 8 / 1GHz						
Memory (GB)						
Percent of CPU Utilization at the peak time e.g. 55%						
Physical disk size (GB)						
PeopleSoft DB storage size (GB)						
Peak non-OLTP % (Online Transaction Processing)						
Please provide, to the best of your ability, the percentage of workload allocated to PeopleSoft reporting and ad hoc queries. Please express it as a percentage. For example, 30% of our end user workload is reporting and query work. _____						

## PART 2: System Configuration

Below is a list of system configuration options. In the table below, please select the options you would like to have included for your recommended system solution

### 2.1. System Configuration Help Text:

There are four major components (tiers) in this solution. They are the Client workstation, Web Server, Application Server, and Database Server. The Web, Application and Database components can each be on a separate server or Logical Partition or they can be combined on one or two servers or Logical Partitions. The Client component is always a separate Windows based server. A configuration with a separate Web server or logical partition provides a security firewall when there is Internet access. There are multiple options for the solution. For example:

Option 1

- Client (workstation)
- Web server
- Application server
- Database server

Option 2

- Client (workstation)
- Web server
- Application server and the Database server reside on the same machine

Option 3

- Client (workstation)
- Web server and Application Server
- Database server

Option 4

- Client (workstation)
- Web server, Application server and Database server all reside on the same machine

**2.2 Select your System Configuration Options from above (for example, option3) and enter it in the table below - Required**

System	Select Configuration Option(s)
Production	
Development	
Test	
Training	
Other	



### 2.3 Select your System High Availability and Redundancy Options

System High Availability and Redundancy Options	Default	Desired
Dual systems hardware failover (i.e. HACMP for DB server) (Y/n)	Yes	
Dual systems hardware failover (i.e. Redundant Application servers) (y/N)	Yes	
Network fail over (i.e. redundant web servers) (Y/n)	Yes	

### 2.4 Select your System Infrastructure and Support Options:

Customer Preferences	Existing	Planned for this workload
Disk type (For example, SAN)		
Tape Subsystem requirements		
Performance Tools S/W required		

### 2.5 Identify your Development Requirements: Required for sizing non-production

**NOTE 1:** Please include ALL (concurrent) instances of each functional non-production system in the 'Total Number of Instances' Column. The default for total number of concurrent instances for all non-production is 3.

**NOTE 2:** The sum of the Heavy, Moderate and Light users should equal your Peak Concurrently Active users. Do not count users twice.

Non-Production System	# of Concurrent Instances	Concurrently active Users		
		Heavy	Medium	Light
Example: Test	2	4	2	1
Development				
Test				
Training				
Quality Assurance				
Other				
Other				
Total # of concurrent instances				
EPM				
CRM				
CIS				
Other				

## PART 3: Production Sizing Inputs:

Please complete the tables on the following pages for the NEW functions and applications that you will implement for processor, memory and disk sizing. This input will help determine the proper processor, memory and disk sizing.

**NOTE: Fill in the table in section 1.3.1 with the existing configuration when requesting a sizing to add new work to an existing system. And, fill in the table below in section 3.1 with the new workload.**

### 3.1 Peak Concurrent Active Users: Required for sizing online

**NOTE 1:** In the table below, please fill in the number of users that will be entering transactions on the system during the peak hour of usage. Do not count users twice (for example, if you have 25 Sales users who also use the Support application, please count the 25 users in either Sales or in Support, but NOT in both).

**NOTE 2:** The sum of the Heavy, Moderate and Light users should equal your Peak Concurrently Active users. Do not count users twice.

**NOTE 3:** See Part3 section 3.4 for EPM

**NOTE 4:** Use PART4 to tell us the specific modules.

<b>Production System</b>	<b>Total Concurrently Active Users</b>		
<b>Function</b>	<b>Heavy</b>	<b>Medium</b>	<b>Light</b>
<b>HRMS</b>			
All HRMS Users			
Reporting users			
HR Self Serve			
<b>Student Admin</b>			
All Student Admin Users			
<b>Financial</b>			
All Financial Users			
Reporting			
<b>SCM</b>			
All SCM Users			
All SCM Self Service Users			
Reporting			
<b>CRM</b>			
All CRM Users			
All CRM SSCS Users			
CIS Users			
<b>ESA</b>			
All ESA Users			
ESA Reporting			
<b>Portal</b>			
All Portal Users			

### 3.2 Peak Batch Processes – Required for sizing batch

3.2.1 Please fill in the following table by providing information about your batch application(s). Refer to section 3.2.2 and 3.2.3 for help text and examples.

Application	Item type	Total “items” processed on a peak day	Number of “items” in the largest group processed on a peak day	Time of day job runs (ex. 10am-3pm)	Maximum time period for the job to run (ex. 2 hrs)
Payroll	paychecks				
Benefits Administration	employees				
Time & Labor	employees				
General Ledger	journal lines				
Accounts Receivable	invoices				
Accounts Payable	vouchers				
Inventory	# of lines				
Purchasing	# of lines				
Billing	# of lines				
Order to Cash	#orders or quotes				

#### 3.2.2 Batch Processes Help Text

1. Total “items” processed: The total amount of things to process, e.g. number of paychecks for Payroll, journal lines for General Ledger, or invoices for Accounts Receivable.
2. # Items in largest group: If the total “items” processed is composed of separate groups within the batch job, e.g. multiple paygroups for Payroll or multiple business units for General Ledger, how large is the largest group? We use this information to make sure the largest subgroup can run on a single processor of a multiple processor system in batch windows specified in this table.
- 3: The input is the volume of work on the peak day. Please normalize annual or monthly volumes to a peak day.
- 4: Consider if tasks are run in parallel or serially.
- 5: Payroll estimate is for the paysheet creation, payroll calculation and the payroll confirm processes. Additional time will be required for other related processes like printing the checks and/or re-run activities. PayCalc is the time it takes to perform payroll calculations for the time period. PayConfirm is the time it takes to repeat the PayCalc step and perform updating of to-date values and calendars, and construct online paychecks.
6. Some tasks, like Accounts Receivables and the tasks defined by the ‘number of items in the largest group’ cannot take advantage of multiple processors or parallel operation. Tasks like these are assumed to run serially.
7. These inputs allow the estimate to consider not only handling the total workload but also to consider requirements for those tasks that do not take advantage of parallel processing.

### 3.2.3. Batch processing Examples

Payroll Sample for 10,000 employees' paychecks processed at night. There are 3 paygroups: salaried, hourly, and part time such that the largest paygroup consists of 5,000 employees. You have 8 hours to do the complete cycle. Since you estimate printing takes 4 hours and occasionally there is a reason to re-run the job, you want the payroll job to be handled in 2 hours. This input allows the estimate to include not only the resources to handle processing all 10,000 checks but also resources appropriate to handle the largest single task of 5,000 paychecks which would not take advantage of multiple processors and parallel operation.

Application	Item type	Total "items" processed on a peak day	Number of "items" in the largest group processed on a peak day	Time of day job runs (ex. 10am-3pm)	Maximum time period for the job to run (ex. 2 hrs)
Payroll	paychecks	10,000	5,000	7PM-9PM	2 hours

AP Sample for 100,000 Accounts Payable vouchers per month where all are processed on the same day. However, the largest single portion of the work is 5,000 vouchers. You would like to process AP work in 4 hours.

Application	Item type	Total "items" processed on a peak day	Number of "items" in the largest group processed on a peak day	Time of day job runs (ex. 10am-3pm)	Maximum time period for the job to run (ex. 2 hrs)
Accounts Payable	vouchers	100,000	5,000	9AM-1PM	4

## 3.3 Disk

3.3.1 How much disk do you want included in your estimate for the production database(s)?

\_\_\_\_\_.

3.3.2 How much disk do you want included in your estimate for all non-production instances?

\_\_\_\_\_.

**NOTE 1:** Our estimate of production disk requirements is based on the PeopleSoft provided disk tool. Please visit [www.ibm.com/erp/sizing](http://www.ibm.com/erp/sizing) to download the PeopleSoft disk sizing questionnaire. Please send the completed questionnaire for a disk estimate to IBM Techline ISV Solution Sizing Center at [eSizings@us.ibm.com](mailto:eSizings@us.ibm.com) (800-426-0222). The disk tool provides disk requirements for the following: user data, catalog, rollback and temp space, PeopleSoft based data tables & code and upgrade space. The number of databases to be supported impacts the total amount of disk required. For example, (multiple) test or development or training databases also need to be considered as appropriate to understand the total disk required.

**3.4 EPM – Required for sizing Enterprise Performance Management (EPM)**

3.4.1 How much disk do you want included in the solution for the EPM production Database?  
\_\_\_\_\_.

3.4.2 How much disk do you want included in the solution for the EPM non-production instance(s)?  
\_\_\_\_\_.

**Note1:** Contact your PeopleSoft representative regarding a disk estimate for EPM

3.4.2 Peak Concurrent Users

<b>EPM</b>	
<b>Heavy, moderate and light categories are not used for EPM</b>	
EPM concurrently active users	

3.4.3 Please use the table below to identify the functions of EPM you plan to use and the number of concurrently active users for each.

<b>Analytics</b>	<b>Includes</b>	<b>Please check functions planned</b>	<b>Number of Concurrently active users</b>
Financial	Business Planning, Financial Warehouse, Budgeting, Balanced Scorecard, Activity Management, Funds Transfer Pricing		
Workforce	Workforce Scorecard, Workforce Rewards, Workforce Planning, HRMS Warehouse		
SCM	SCM Warehouse		
CRM	Customer Behavior Modeling, Customer Scorecard, CRM Warehouse		
Other	Analytic Forecasting, Asset Liability, Enterprise Warehouse, EPM Portal Pack, Risk Weighted Capital		

### 3.4.4 3rd Party OLAP Tool

Please indicate your planned OLAP tool

	Cognos	Micro Strategy	Other	None
OLAP Tool				

### 3.4.5 EPM Batch Information

ETL	
Rows per hour	

**NOTE** Leave ETL rows per hour blank unless greater than 5,000,000.

## 3.5 Reporting

3.5.1 Do you plan to use reporting capability within PeopleTools like PeopleSoft Query or SQR? Our standard sizing assumes 20% additional resources on the DB for ad hoc query and reporting activity. Please specify the value you want used for ad hoc query and reporting activity for this sizing (default is 20%). \_\_\_\_\_

3.5.2 Do you plan to use other reporting products? Please select from the table below.

Reporting Tools	Do you plan to use (Yes or No)	Indicate Heavy (H) or Light (L) use
Crystal/nVision Reports		
Cognos Powerplay		
Other		
How many reporting servers (default=1) _____		

**NOTE:** These products typically require a Windows supported platform

## PART 4: Application Modules

Please check the modules below which you plan to implement and which corresponds to the inputs provided in Part3.

### 4.1 HCM (HRMS)

#### **HRMS Application Modules:**

<input type="checkbox"/>	Benefits administration	<input type="checkbox"/>	Payroll	<input type="checkbox"/>	Human Resources	<input type="checkbox"/>	Time and Labor
<input type="checkbox"/>	Other	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
HR Self Serve							
<input type="checkbox"/>	eBenefits	<input type="checkbox"/>	ePay	<input type="checkbox"/>	Other	<input type="checkbox"/>	

### 4.2 Student Administration

#### **Student Administration Application Modules:**

<input type="checkbox"/>	Student Administration	<input type="checkbox"/>	Student	<input type="checkbox"/>	Other	<input type="checkbox"/>	
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### 4.3 Financials

#### **Financials Application Modules:**

<input type="checkbox"/>	Asset Management	<input type="checkbox"/>	Accounts Payable	<input type="checkbox"/>	Accounts Receivable	<input type="checkbox"/>	Asset
<input type="checkbox"/>	Project	<input type="checkbox"/>	Budget	<input type="checkbox"/>	Other	<input type="checkbox"/>	

### 4.4 Supply Chain Management

#### **SCM Application Modules:**

<input type="checkbox"/>	Billing	<input type="checkbox"/>	Purchasing	<input type="checkbox"/>	Inventory	<input type="checkbox"/>	Order Mgmt
<input type="checkbox"/>	Other	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
SCM Self Serve							
<input type="checkbox"/>	eProcurement	<input type="checkbox"/>	eProduct Management	<input type="checkbox"/>	eBill Payment	<input type="checkbox"/>	eStore
<input type="checkbox"/>	eSupplier Collaboration	<input type="checkbox"/>	Other	<input type="checkbox"/>		<input type="checkbox"/>	

### 4.5 CRM

#### **CRM Application Modules:**

<input type="checkbox"/>	Support	<input type="checkbox"/>	Sales	<input type="checkbox"/>	Field Service	<input type="checkbox"/>	Help Desk
<input type="checkbox"/>	Interaction Management	<input type="checkbox"/>	Marketing	<input type="checkbox"/>	CIS	<input type="checkbox"/>	Other

**NOTE:** If you are planning to run the CIS application, it is important that you also fill out a Batch Sizing Questionnaire. The CIS Batch Sizing Questionnaire can be downloaded from [www.ibm.com/erp/sizing](http://www.ibm.com/erp/sizing), or request a copy from the IBM Sizing Center at [eSizings@us.ibm.com](mailto:eSizings@us.ibm.com)

#### 4.6 ESA:

##### **ESA Application Modules:**

	Billing		Contracts		Expenses		General Ledger
	Grants		Mobile Time & Expense		Payables		Projects
	Travel		Services Procurement		Resource Mgt.		

#### 4.7 Portals

##### **Portal Application Modules:**

	Enterprise Portal		CRM Portal Pack		Directory Interface		EPM Portal Pack
	Financials Portal Pack		HRMS Portal Pack		ESA Portal Pack		SCM Portal Pack

#### 4.8 Enterprise Performance Management

##### **EPM Application Modules:**

	Activity Based Mgt.		Analytic Forecasting		Asset Liability		Balanced Scorecard
	Budgeting		Business Planning		CRM Warehouse		Customer Scorecard
	Enterprise Warehouse		EPM Portal Pack		Financials Warehouse		Funds Transfer Pricing
	HRMS Warehouse		Risk-Weighted Capital		Supply Chain Warehouse		Customer Behavior Modeling
	Workforce Rewards		Workforce Scorecard		Workforce Planning		