

Lab Upgrades Meet a Variety of Needs

BACKGROUND

The following three diverse institutions are examples of CedarCrestone, Inc. (“CCI”) clients that used the Upgrade Lab and onsite support to upgrade their Oracle/PeopleSoft software: College of the Holy Cross (“Holy Cross”), MassBay Community College (“MassBay”) and the University of Pittsburgh. These institutions range in size from 3,000 to 32,000 students. They represent both public and private colleges and universities and include Associates, Baccalaureate, and Doctoral Research Extensive institutions. They upgraded one or more of the following Oracle/PeopleSoft applications to 8.9: Campus Solutions (CS), Human Capital Management System (HCM) and/or Financials (Fin).

CHALLENGES

The three featured institutions had five major challenges in common: (1) They were seeking a cost effective approach to upgrade their software; (2) they needed to minimize the impact of the upgrade upon their functional and technical staff and on their technical environments; (3) their business processes needed to be streamlined to improve efficiency and customer service; (4) they needed a focused, accountability-based approach to assure an on-time and within budget upgrade; and (5) their staff needed training and knowledge transfer to optimize the capabilities available in the new release. These institutions also had some unique challenges. For example, the University of Pittsburgh wanted to reduce the number of modifications that it would have to maintain once it upgraded to the new software version. MassBay needed to restructure its security setup to take advantage of the security features in the new release. Holy Cross had the challenge of upgrading from 7.6 to 8.9, a range of five versions.

SOLUTIONS

CCI’s upgrade solution is tailored to each client’s needs. For example, at Holy Cross, where the client had to upgrade from a client server application to a web-based application with many changes in functionality, we spent considerable time doing a detailed fit/gap analysis. CCI also focused on training, so that the client’s staff understood all the new functionality, how it worked and how it would impact them. By offloading most of the technical work involved in running and debugging upgrade scripts, the Holy Cross staff had more time to resolve issues and discover how to improve processes with the new version. At the University of Pittsburgh, where the client wanted to improve process efficiency and customer service, we jointly redesigned business processes by taking advantage of the Campus Solutions 8.9 functionality. We also reviewed and modified security and configuration. We addressed the project staffing challenges at MassBay by altering the staffing profile for the project. For example, CCI provided additional



Industry	Higher Education
Services	Lab Upgrade of Oracle/PeopleSoft Applications
Modules	<ul style="list-style-type: none">• Campus Solutions 8.9: Campus Community, Admissions and Recruitment, Student Records, Academic Advising, Financial Aid and Student Financials• Financials 8.9: General Ledger, Accounts Payable, Purchasing• Human Capital Management 8.9: Human Resources, Payroll, Compensation, Base Benefits, ePay



University of Pittsburgh

Holy Cross



project management, supplemental onsite technical assistance and an onsite Financials functional consultant for most of the project. We also provided a security consultant to redesign the approach to security, and we focused on knowledge transfer to the IT project team.

RESULTS AND BENEFITS

As a result of using a lab approach, all of the featured institutions minimized the impact of an upgrade on their staff. They also were able to streamline their business processes as a result of the upgrade and acquired

expertise in the application(s) through knowledge transfer from CCI consultants. MassBay, for example, enhanced its financial processes, reporting and accountability. It also optimized the academic advising capabilities and other new functionality of Campus Solutions 8.9. At the University of Pittsburgh, where the upgrade also was completed on schedule and within budget, we jointly created more efficient business processes and reduced the number of software modifications. Holy Cross also adhered to its timeline and accomplished all of its deliverables.

CedarCrestone worked collaboratively with our upgrade management team to structure a project plan that addressed our unique needs and desires. Thanks to CedarCrestone, we were able to successfully complete the upgrade on time and in budget. CCI fully embraced its partnership role, and we could not have been happier with its positive and collaborative spirit and with its responsiveness to our needs. Cedar Crestone was a major factor in our success.

Dr. Robert F. Pack, Vice Provost
University of Pittsburgh

From the proposal stage onward, CCI invested in learning our campus business process, our pain points and the areas where our ERP upgrade could make vital and perceptible differences to our students, faculty and staff. CCI's consultants kept the team focused on the issues that mattered to us. When problems arose and our staff was faced with "not knowing what they didn't know," CCI consultants stayed with the issues until they were resolved. CCI kept the project both within budget and on-time. As complex and multifaceted as our ERP upgrade was for a relatively small institution such as ours, we would not have been successful without CCI – it's just as simple as that.

Dr. Marc Eichen, Vice President for Information Technology and Chief Information Officer
Massachusetts Bay Community College

Using CedarCrestone's Upgrade Lab contributed significantly to the success of the project. It was our first time using an upgrade lab; and it helped on many levels. Working with the Upgrade Lab staff was also a key success factor. Our point of contact at the Lab kept us well-informed of progress on his end and helped us stay on track with the project schedule. It was a great partnership. We are now using the Lab for our Finance upgrade!

Dr. Ellen J. Keohane, Director, Information Technology Services
College of the Holy Cross

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contact@CedarCrestone.com
866.827.3786

About CedarCrestone

CedarCrestone delivers real client success by providing consulting, technology, and managed services for the deployment, management, and optimization of Oracle applications and technology.