Lab Upgrades Meet a Variety of Needs

Holy Cross

MassBay COMMUNITY COLLEGE

University of Pittsburgh

BACKGROUND

The following three diverse institutions are examples of Sierra-Cedar clients who used the Upgrade Lab and onsite support to upgrade their 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 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.

Industry	Higher Education
Services	Lab Upgrade
Application & Modules	**PeopleSoft Campus Solutions 8.9** • Campus Community • Admissions and Recruitment • Student Records • Academic Advising • Financial Aid and • Student Financials **PeopleSoft Financials 8.9** • General Ledger • Accounts Payable • Purchasing **PeopleSoft Human Capital Management 8.9** • Human Resources • Payroll • Compensation • Base Benefits • ePay

SOLUTION

Sierra-Cedar's upgrade solution is tailored to meet each client's needs. At Holy Cross, where the client had to upgrade from a client server application to web-based application with many changes in functionality, considerable time was spent doing a detailed fit/gap analysis. Sierra-Cedar 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, business processes were jointly redesigned

by taking advantage of the Campus Solutions 8.9 functionality. Sierra-Cedar also reviewed and modified security and configuration. At MassBay, the project staffing challenges were addressed by altering the staffing profile.

> *Using Sierra-Cedar'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!*
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> **Dr. Ellen J. Keohane**
> Director, Information Technology Services
> College of the Holy Cross

For example, Sierra-Cedar provided additional project management, supplemental onsite technical assistance, and an onsite Financials functional consultant for most of the project. A security consultant was also provided to redesign the approach to security, while focusing on knowledge transfer to the IT project team.

> *Sierra-Cedar worked collaboratively with our upgrade management team to structure a project plan that addressed our unique needs and desires. Thanks to Sierra-Cedar, 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.*
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> **Dr. Robert F. Pack**
> Vice Provost Emeritus
> University of Pittsburgh

> *From the proposal stage onward, Sierra-Cedar 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. Sierra-Cedar'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," Sierra-Cedar consultants stayed with the issues until they were resolved. Sierra-Cedar 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 Sierra-Cedar—it's just as simple as that.*
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> **Dr. Marc Eichen**
> Former Vice President for Information Technology
> and
> Chief Information Officer
> Massachusetts Bay Community College

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 and acquire expertise in the applications through knowledge transfer from Sierra-Cedar consultants. MassBay was able to enhance its financial processes, reporting, and accountability, as well as optimize 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, more efficient business processes were jointly created and the number of software modifications were reduced. Holy Cross also adhered to its timeline and accomplished all of its deliverables.

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