

# Fast Track Implementation of PeopleSoft Campus Solutions



techlogix

**ORACLE**® Platinum  
Partner

# First Things

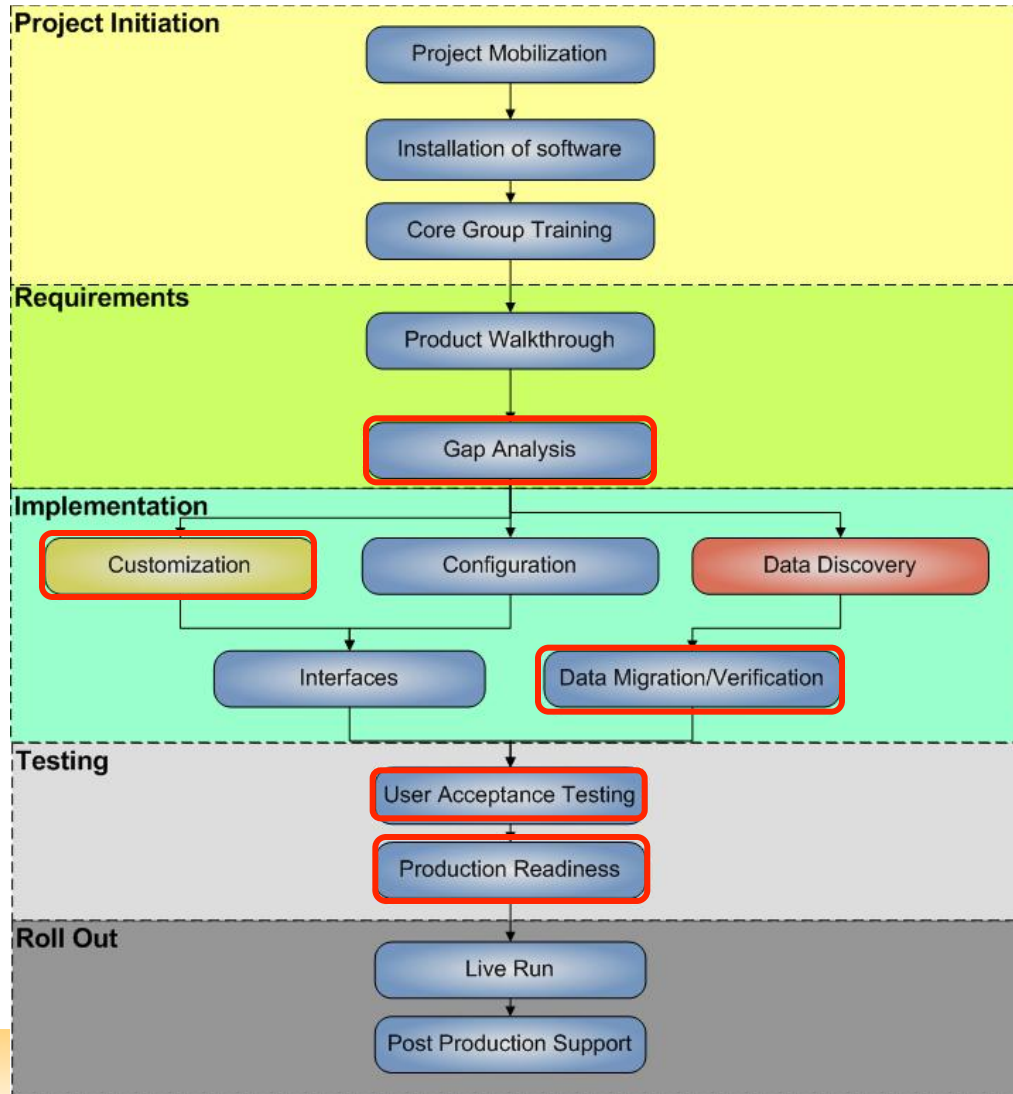
- What's Rapid Implementation?
- Depends on who you are:
  - ◆ Greenfield University?
  - ◆ Smaller University with limited number of programs? (Say less than 2,500 students and 10 programs)
  - ◆ Middle sized University with a full set of programs (Say up to 10,000 students and 25-30 programs)
  - ◆ Large university with multi-campus presence? (More than 10,000 students)

# If you're a Greenfield University

- Adopt business processes and standards from the product
- Extensive supporting documentation for configuration and deployment
- Based on best practices from past implementations
- That was easy!

# If you're a Smaller or a Midsized University...

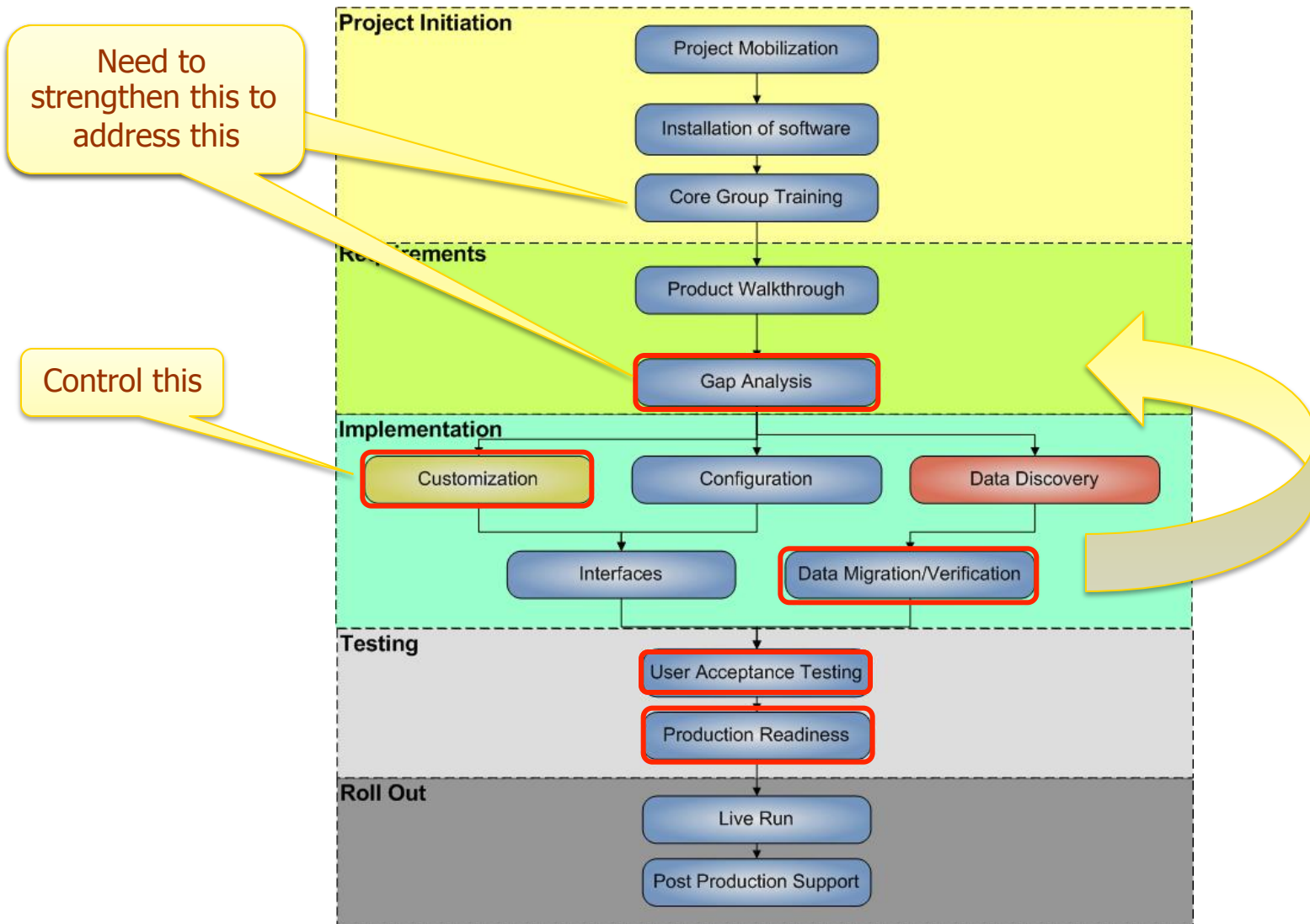
- Why does implementation take so long?



# Drilldown

- Gap Analysis: takes University users a long time to sign off on Requirements and gaps.
- Customization: Can we control and minimize the extent of customization?
- Data Provisioning/Migration/Verification: Esp. a challenge in legacy/manual systems
- User Acceptance Testing: Do we have the skilled resources in the University to complete the UAT on time?
- Production Readiness: Are all the other pieces in place?

# So what does this mean?



# The importance of process

- The implementation methodology – what are we going to do, when, and how.
- The Techlogix CSX Methodology:
  - ◆ Developed over 3 years of delivering PeopleSoft Campus Solutions in 11 universities
  - ◆ A set of templates and best practices that have repeatedly delivered breakthrough project performance
  - ◆ Validated across and customized in real life implementations
  - ◆ Tuned for a variety of university types (public, private, large general, small focused etc.)
  - ◆ Used in implementations in Pakistan, Malaysia and Thailand

# CSX Overview

Initiation

Planning

Analysis

Design

Build

Test

Deliver

Rollout

Support

- 9 Stage process that governs the entire solution lifecycle
- Based on PMI principles but heavily customized for implementing PeopleSoft Campus Solutions
- Techlogix CSX Methodology consists of:
  - Project Governance methodology
  - Detailed description of activities, roles and outputs of each stage
  - Artifacts and templates for all deliverables
  - Project team resource requirements (both University and Techlogix)
  - Enabling tools (document repository, issue and defect repository)
  - Process delivery metrics

# Solution Implementation Team

<b>Resource Type</b>	<b>Responsibilities</b>
Project Manager	<ul style="list-style-type: none"><li>■ Oversees the Campus Solutions implementation as defined by CSX</li></ul>
System Architect	<ul style="list-style-type: none"><li>■ Configurations Design</li><li>■ Custom Extensions Design</li><li>■ Interface Design</li></ul>
Analysts	<ul style="list-style-type: none"><li>■ Rules, Policies and Process Analysis</li><li>■ Coding Schemes</li><li>■ Configurations Design</li></ul>
Developers	<ul style="list-style-type: none"><li>■ Data Validation and Loading</li><li>■ Development of interfaces and custom extensions</li><li>■ Quality assurance</li></ul>

# Project Deliverables: Summary

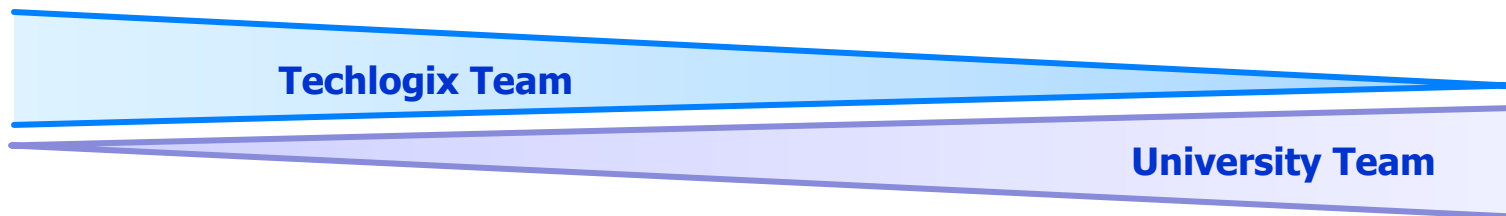


- Contract Finalization
- **Pre-Implementation Training**
- Infrastructure Planning
- Implementation and Governance Plan
- **University Team Finalization**
- Change Management Strategy

- Communication Plan
- **Requirement Engg.**
- High Level Design
- **Master Data Gathering**
- Conversion Strategy
- Interface Strategy
- Testing Strategy

- Configuration
- Data Cleansing and Conversion
- Interface Programs
- Report Building
- Security Management
- End User Training Plan
- **User Training Materials**
- Testing Strategy & Scripts

- End User Training
- Final Data Conversion
- User Acceptance Testing
- Cutover to Production
- System Retirement
- Go Live Acceptance
- Support Plan



# But its not just the process...

- The Implementation Team (both University and implementer)
  - ◆ Building a strong implementation team – functional and technical
  - ◆ Managing the mix between the internal team and the vendor team
- Delivery management & oversight:
  - ◆ Partnership with Oracle Customer Care to provide project assurance

# But its not just the implementation itself...

- Implementing PeopleSoft Campus Solutions itself
  - Managing the migration from the existing system (if any) to the new
  - Orchestrating the infrastructure changes required by newer systems
  - Resourcing the people that will implement and manage all of this
  - Managing the internal organizational change to roll this out

# Migrating to the new system

- Provisioning master data
- Data enrichment
- Data migration
- Scheduling Go-Live
  - ◆ Infrastructure
  - ◆ Training
  - ◆ Synchronizing with the academic calendar

# Migrating to a mission critical IT infrastructure

- New hardware
- Data center provisioning
- Overhaul of networking infrastructure
- High availability across hardware, data center and networking
- Managing security
- Disaster Recovery
- Operations and Maintenance across this new more complex hardware, networking and applications environment – **where's the HR to do this?**

# Resourcing People and Managing Change

- What is the immediate term and long term Operations & Maintenance model? (there's a 6-12 month resource spike you need to manage)
- Who will drive the people, process, organization and cultural change not just in the Go-Live but in ongoing upkeep and maintenance of the system on a semester by semester basis

# Moving to a Managed Services model...

- Hardware required for Campus Solutions (Servers & Storage)
- Placement of hardware in Tier 4 Data Center
- Placement of Disaster Recovery (DR) hardware in a DR site
- Operations and Maintenance cost for Hardware
- Managed services for PeopleSoft Campus Solutions to keep system operational
- Optional:
  - ◆ Oracle Technology annual support charge
  - ◆ PeopleSoft Campus Solutions license annual support charge

# Returning to the implementation challenge

- Implementing PeopleSoft Campus Solutions itself
- Managing the migration from the existing system to the new
- Orchestrating the infrastructure changes required by newer systems
- Resourcing the people that will implement and manage all of this
- Managing the internal organizational change to roll this out
- **Managing the project and synchronizing all these work tracks to converge at a single point in time**

# Synchronizing work streams

- Your teams WILL silo
- You need a steering committee with IT, business and vendor participation which is looking across ALL these issues
  - ◆ This means a committee in which the hardware vendor, the networking vendor, the system integrator, IT, the business, HR etc. are all sitting together
  - ◆ This is NOT the Campus Solutions steering committee
- Lack of synchronization amongst these streams is a principal reason for delays, extensions in plans etc.

# Key Takeaways

- The product is there. **Fast** Implementation is the challenge both from a cost and time perspective
- Understanding local constraints (specific to each country in the region) while still delivering on global standards of excellence
- Implementation:
  - ◆ University Team & detailed Product Training
  - ◆ Starting work on data provisioning and migration upfront
  - ◆ Minimizing customization
- Infrastructure:
  - ◆ Delivering on the infrastructure itself
  - ◆ Synchronizing multiple vendor work streams

# Some of the key lessons that shaped our approach

- Start Data Cleansing Early – Data Migration can turn ugly
- Ensure that the Customer takes Change Management Seriously – It can be the difference between success and failure
- Ensure that the client commits its best resources for the project
- Testing should be thorough and real (“week in a life”)
- Ensure that the implementation does not throw out those systems/processes that have worked well for the client
- Avoid scope creep: say ‘later’ not ‘no’
- Focus on the critical matters: prioritize
- Facilitate quick decision making: decision paralysis has sabotaged many implementations

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Thank you for your time



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KARACHI BOSTON BEIJING DUBAI ISLAMABAD  
KUALA LUMPUR LAHORE