

MARQUETTE



Lessons Learned from Marquette's V9 Upgrade

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Jan Judziewicz



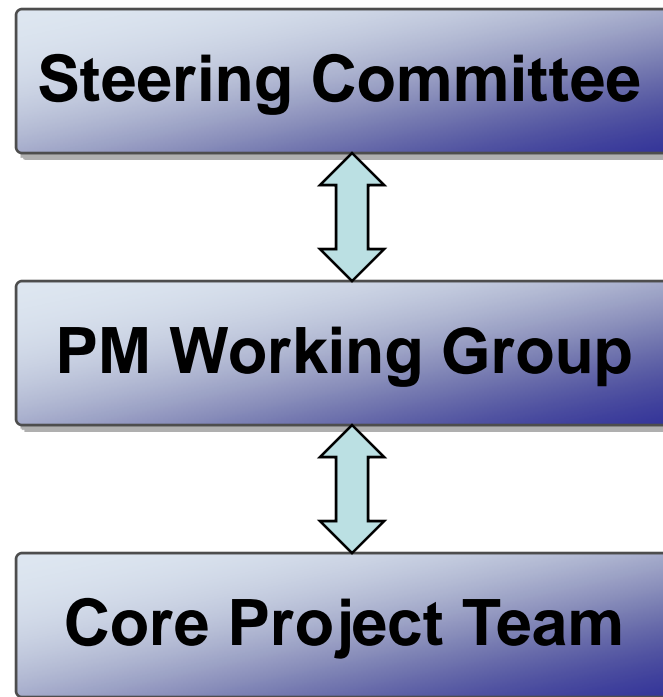


About Marquette

- Catholic, Jesuit, Private University
- Undergraduate, Law, Dental, Graduate
- Total Enrollment: 11,600
- Faculty/Staff: 2,500
- PeopleSoft Student Administration
 - Implemented v. 8.0 SP1 in August 2004
 - Upgraded to v. 9.0 in Jul 2008



Project Governance





Steering Committee

- VP of Finance
- Associate Vice President for Finance
- Dean of Admissions
- Associate Vice Provost for Academic Support Programs
- Director of Applications
- Chief Information Officer
- Senior Director IT Services



PM Working Group

- Dean of Admissions
- Director of Financial Aid
- Bursar
- Registrar
- Director of Applications
- Senior Director IT Services
- Project Manager



Core Project Team

- Admissions Lead
- Financial Aid Lead
- Student Financials Lead
- Student Records Lead
- Developer *Team*
- Database/Systems *Team*
- Reports Lead



Project Governance Lessons Learned

- Clearly set out the governance structure and rationale
- Set meeting expectations for each governance team
- Set expectations for effort level for each team
 - Difficult for us, as this was our first Psoft upgrade
- Ensure support from Senior Management
 - For proper funding and staffing
- Dispute and Conflict Resolution

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Kurt Gering





Timeline

- Kickoff
 - June '07
- Fit-Gap
 - Sep '07 through Dec '07
- Upgrade Passes/PeopleSoft Bundles
 - 4 practice passes
 - » July, Nov, March, May
 - 4 bundles
 - » V8 and V9



Timeline

Move to Production/Go-Live

- Started on Wednesday, July 23rd
 - Pre-MTP Data Validation Reports
- MTP completed on Sat evening, July 26th
 - Post-MTP Data Validation Reports
- Testing Sunday, July 27th
- Release to Campus Monday noon, July 28th



Kickoff Lessons Learned

Set Clear Definitions

- Project Charter and Scope
 - Project Management Role
 - Functional Role
 - Developer Role
 - Schedule
- Documentation
 - Processes
 - Task Updates
 - Issues/Risks



Kickoff Lessons Learned

Production Development Freeze

- Development freeze went into affect with project kick-off meeting
- No new development unless regulation related
- We only had 3 exceptions that were required to be approved via PM Working Group



Kickoff Lessons Learned

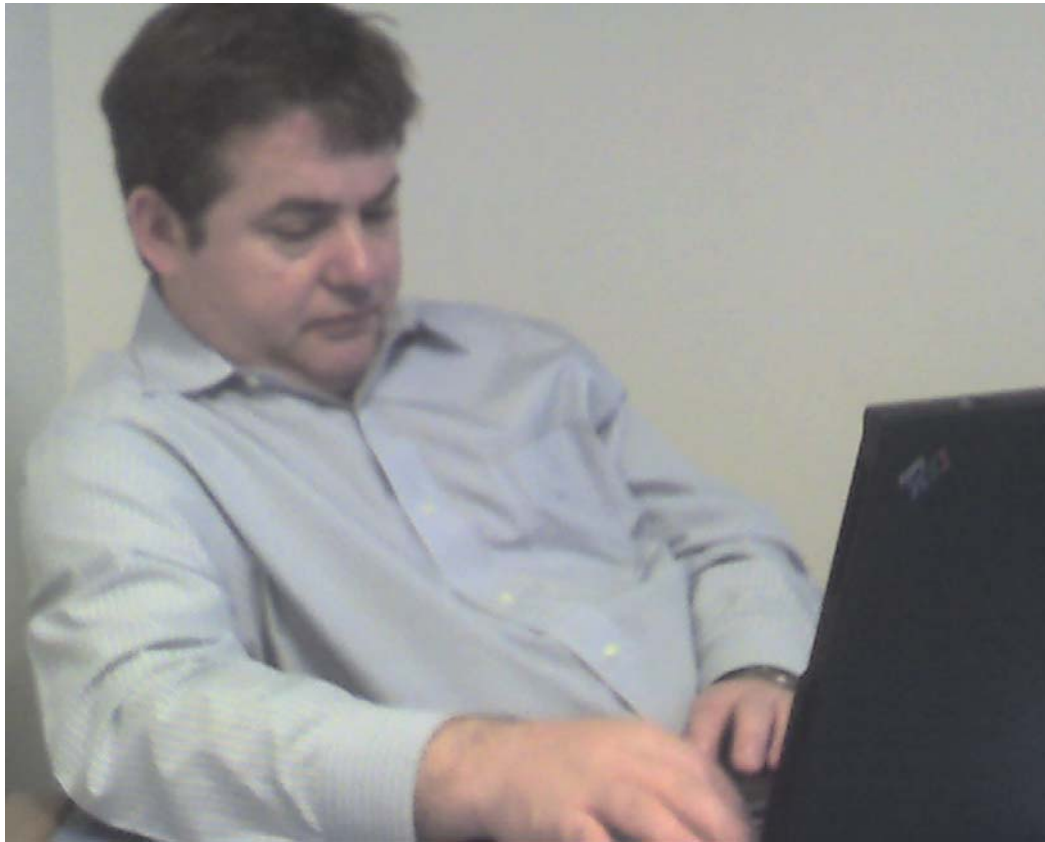
Consulting Resources

- Adequacy of External Support Resources
 - Both technical and functional
 - Do they have previous PS9 Experience?
- Define Post Fit/Gap Support SLA's
- Project Audits

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Quentin Hart-Slater





Fit/Gap MODS

We had 336 MODs in total:

- Admissions – 43
- Financial Aid – 80
- Student Financials – 47
- Student Records – 46
- Self Service – 21
- Interfaces – 18
- Reports – 81



Fit/Gap MODS

Consultant onsite for 3-4 weeks working with each of the following functional areas:

- Admissions
- Financial Aid
- Student Financials
- Student Records



Fit/Gap Lessons Learned

Prioritize Fit/Gap Schedule

- Dependent on number of MOD's in that functional area
- Dependent on Activity Duration Estimates for each MOD
- Dependent Upon Activity Sequencing
- We probably should have had FA go 1st not 3rd



Fit/Gap Lessons Learned (Cont.)

MOD Review Process

- Reviewed each V8 MOD before retrofitting it
- Painful, but we felt it was needed. Decisions were quick.
- Leave enough time for the review and retrofitting
- Make sure review is fair, proper representation at the review
- Not going to make many go away (<10)



Fit/Gap Lessons Learned (Cont.)

Interfaces

- Leave enough time for thorough testing, set up a suitable environment on each end
- Don't forget the server configs that need to be in place to share files back and forth in new environment
- Cutoff database access to old prod to ferret out those that may have been forgotten
- Document them all for the future



Fit/Gap Lessons Learned (Cont.)

Security

- Student Group changes in V9
- Get started early in the project
- Check it early and often
- Run Psoft Security Update
- Cross-functional security discussions
- Need further detail?
 - PS9 Security Conversion & Setup Seminar



Fit/Gap Lessons Learned (Cont.)

Student Center

- Convene cross-functional group to review and make recommendations
- Start-to-end testing
 - Admit student, give them FA, etc.
- Surprised at the amount of effort to configure



Fit/Gap Lessons Learned (Cont.)

Queries

- Allow enough time to migrate queries between V8 & V9
- Some of our first, high need items post go-live were getting query trees in order
- Be aware of the new security views

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Kurt Gering





Passes/Bundles Lessons Learned

Bundles

- “Not supported by PS, but decision was made to apply during upgrade, because needed v8 and v9 to be at same bundle level for Move to Production
- FA needed v8 bundles to test v9

Ensure you have enough practice passes

- Need accurate timings for final move to production
- DBA's need to tinker to reduce timings
- Make sure that MODs don't need adjusting after bundles



Passes/Bundles Lessons Learned

General Observations:

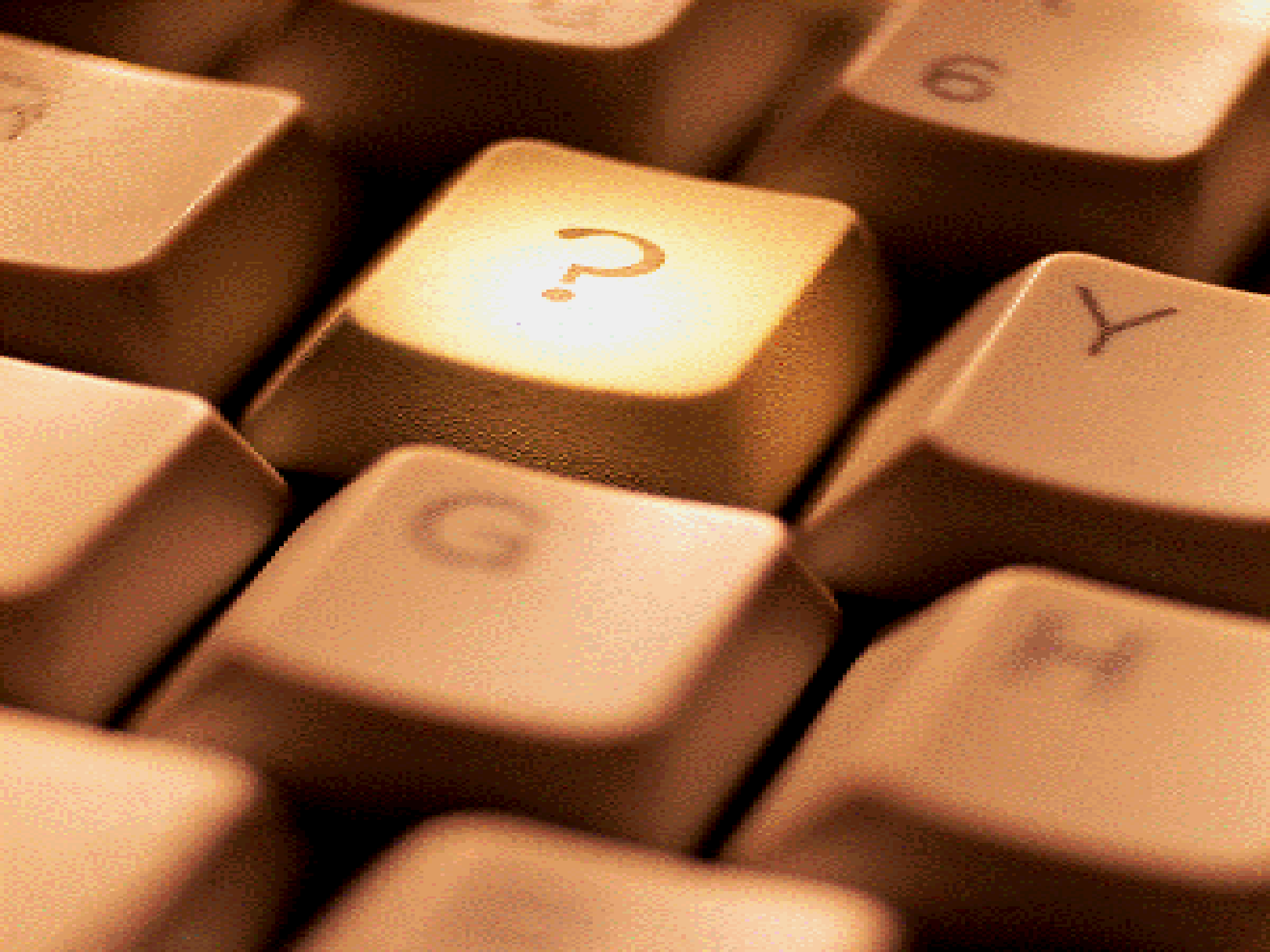
- Mitigate the interference to functional testing as best you can
- End-to-End Cross Functional Testing
- Use existing testing scripts where possible, but updated where necessary for V9
- Determine appropriate testing levels in Scope Statement
 - Load Testing
 - Is it possible to test too much?



MTP/Go-Live Lessons Learned

General Observations:

- Central War Room
 - PeopleSoft Resource Information Center
 - Facilitates communication
 - Personed by PM, Systems Lead, Applications Director
- Pursue PS Support
- Go-Live Checklists
- Dress Rehearsal





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Thank You!

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