Business challenge

To increase service and performance levels and improve disaster recovery, Case Western Reserve University (CWRU) sought to transform support for its Oracle PeopleSoft applications for many essential business processes.

Transformation

With cloud-based hosting services from IBM® Global Technology Services®—Managed Application Services, CWRU gains management of its business-critical PeopleSoft applications, freeing IT staff to focus on strategic initiatives in research, teaching and learning.

Sue Workman
Chief Information
Officer, Case Western
Reserve University

Business benefits

100%
increase
in the number of students able to register in the first minute of the registration period

Helps ensure
business continuity
in case of a disaster

Frees IT staff
from operations support
to improving systems that promote strategic university goals

Case Western Reserve University

Graduating to IBM Managed Application Services for its Oracle PeopleSoft applications

Case Western Reserve University (CWRU), located in Cleveland, Ohio, is one of America's leading private research institutions. It boasts 3,360 full-time faculty and nearly 3,100 full-time and part-time staff. Founded in 1826, the university offers a unique combination of forward-thinking educational opportunities in an inspiring cultural setting. The institution's nationally recognized programs include arts and sciences, dental medicine, engineering, law, management, medicine, nursing and social work. Its students represent all 50 states and 91 countries.

"This is a start of a wave that you'll see from universities to move their financial systems and their ERP systems to a cloud-based system."

—Sue Workman,
Chief Information Officer,
Case Western Reserve University

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Contending with aging technology

Case Western Reserve University (CWRU) is a school of moderate size—approximately 5,000 undergraduate and 6,000 graduate students—with national standing. Located roughly 10 miles from downtown Cleveland in an area called University Circle, more than 40 educational, cultural, medical, religious and social service institutions surround the school. The result: CWRU students can experience and learn from such respected neighbors as the Cleveland Orchestra, the Cleveland Museum of Art and the Cleveland Clinic.

This rich learning environment may also contribute to the school's stellar rankings. In 2014, Washington Monthly rated it seventh among colleges that contribute to the national good. In 2016, U.S. News & World Report rated it first among national universities in Ohio and 37th nationally.

As the school entered the 21st century's second decade, challenges emerged in the complex data systems that support its financial, human resources, student information and budgeting functions. The computer hardware hosted on premises supporting the school's Oracle PeopleSoft applications was approaching end of life.

CWRU uses PeopleSoft applications including Human Capital Management, Financials, and Campus Solutions for many critical business processes, such as student registration and payroll. The school had not upgraded or replaced hardware since the beginning of the implementation in 2004, and a local shortage of resources in PeopleSoft application development had not improved.

"With aging hardware, we were deferring standard operating system maintenance and security patching," says Sue Workman, the university's vice president for IT services and chief information officer (CIO). "We had concerns about how the machines would recover during such activities."

Another issue: finding the people to care for the PeopleSoft applications. "We needed technical resources with specific performance-tuning experience in the multiple layers of the infrastructure," explains Colleen Nagy, the university's senior director of enterprise systems. "Over the past few years, Cleveland has become a hotbed for technology, and the demand for technical talent is very high. CWRU, along with other Cleveland companies, has experienced difficulties in hiring PeopleSoft talent."

"All of the enterprise systems must be available to our customers any time and any day they need them," notes Workman. "Academic days such as the first several weeks of classes, grading time frames and peak registration periods are probably the most critical. Yet administrative days—such as financials closings, payroll processing days, as well as the key activities that follow the academic calendar and fiscal year-end—are important as well."

Pressure increased as the school kicked off a strategic initiative to increase undergraduate enrollment. And a growing student population wasn't the only factor requiring data system flexibility. Usage varies widely during the enrollment cycle, reaching a peak as students trying to register for classes flood the system with requests. It was essential that the system meet surging demand, but the school wanted to avoid building and paying for extra capacity that would sit idle for much of the year.

There was one final concern: CWRU's data centers are vulnerable to a major disaster, such as a gas explosion or flooding. "We have two data centers, but they're two blocks apart," Workman says. "A major disaster on the street could destroy both buildings and take weeks to restore the applications. We needed an offsite disaster recovery site."

Making the Move

In 2012, CWRU formed a steering committee to explore moving the school's PeopleSoft infrastructure off campus. Members represented the university's business owners—major users of PeopleSoft applications from across the campus. The committee defined four main goals: improve service and raise performance levels; help reduce risk; enhance business continuity; and align institutional resources to university priorities and needs.

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—Colleen Nagy, senior director of enterprise systems, Case Western Reserve University

"The point we made was that the service would be enhanced because our applications would be sitting on better infrastructure in a more secure environment and more resources monitoring our systems," Nagy elaborates. "Instead of spending time on operations, University Technology can focus on improving our systems to meet the university's priorities."

After defining the project's scope, investigating costs and service levels, and exploring alternatives, CWRU issued a request for proposal (RFP). The University Technology [UTech] staff and the business owners' committee scrutinized proposals, and the finalist data centers received visits. After careful consideration, the school chose to have the team that is now IBM® Global Technology Services—Managed Application Services host and manage its PeopleSoft systems.

According to Nagy, many factors were behind the decision. One was the service team's partnership with Oracle and its experience in hosting and managing PeopleSoft applications on behalf of its customers. Another advantage: data centers designed and managed to deliver up to 99.999 percent uptime with comprehensive service level agreements (SLAs).

With the decision made, execution was next. Nagy says: "The implementation required a well-thought-out plan that included end users' input and buy-in—one that minimized disruption to their yearly activities. The plan required patience from our business service owners, who, in some cases, would have to wait on new functionality and upgrades due to this initiative."

Simpler migrations came first, helping CWRU IT staff, business owners and the managed services team's experts better understand how to plan and prepare for increasingly complex implementations. Playing a key role was Matt Panchur, enterprise applications manager for CWRU.

"I wanted realistic load testing that would replicate what we've experienced from a student's perspective in years past," Panchur comments. "I made sure that the teams focused on that. They've bent over backward making sure that we were hitting the numbers that we had hit in the past. What I didn't expect was to hit it out of the park."

Testing commenced in the spring of 2014 and continued through June. In July, the system migrated to offsite data centers. But the big test came in November, as students rushed to register for spring classes.

Obtaining the performance grade

Students load their shopping cart weeks in advance of the enrollment period and registration appointments start exactly at 7 AM on the first day. "Students will hover over the submit button, and at 6:59 they'll hit it," explains Panchur. In the past, this has sometimes resulted in delay and frustration, but this time it was different.

A team of experts stood ready. "We had 7 - 8 people at 6:45 to 8 AM just watching—an extended team that we haven't had before to make sure that the students' experience was positive," Panchur notes. And it was.

Response times went from minutes to seconds. "The number of students able to register within the first minute of registration doubled, compared to the same time period in previous years," Panchur says. "We saw the number able to successfully register for first-year classes triple."

Improving service for students is a fundamental gain from the hosted PeopleSoft solution, but other benefits are adding up too. "We're becoming greener and consuming less energy," Panchur notes. "We've shut down 40 or so ERP servers."

"Instead of focusing on the day-to-day issues of getting things up and running, we can turn our attention to increasing functionality, conducting upgrades more quickly and adding more mobile capabilities," explains senior director Nagy. "This is Phase 1 of trying to get out of the data center business."

CIO Workman, too, likes the idea of leaving data center operations in the past. "You can't just buy one generator. You need redundancy on your generator, you need redundancy on your cooling," she elaborates. "There are a lot of things adding to the cost of higher education that we think you can take out of the infrastructure. We hope that over time we can utilize some of those personnel and resources to do other value-added initiatives."

Having the school's primary data center now on the east coast and a backup site on the west coast eased her worries about a major disaster. "This was one of the key objectives for the university when looking into the hosting option," she says. "Ensuring business continuity in the event of any disaster, whether it is the local data center or at the primary data center, was a critical factor. It is valuable to us having an enterprise system restored in less than 48 hours in a crisis."

Teams of CWRU service managers work daily with IBM application service leads for each of the major PeopleSoft applications to keep maintenance and development initiatives on track. Service support is available 24 hours a day as required. IBM also provides some PeopleSoft application development work for the university and has upgraded the PeopleSoft Financials and PeopleSoft Human Capital Management systems to the latest version.

"We had a very strong team on this collaboration to help ensure a successful transition," comments Nagy. "IBM has brought the utmost in professionalism and technical expertise to our team to help provide the highest level of support to our customers."

CWRU reports that the first six months of the migration to IBM support was seamless, but there is more work to be done as it migrates to new IBM data centers. The university fully expects that the IBM and CWRU teams can work together closely to successfully accomplish this major undertaking.

Although CWRU is one of only a handful of the 62 schools in the Association of American Universities (AAU) to move to a hosted data solution, Workman expects it won't be the last.

"We were first to do this with our financials and student information system," Workman notes. "I had a couple of CIOs say, 'Are you crazy?'"

You're going to put your financials somewhere else?' IBM runs very large data centers. We've been to their network operations centers and their security areas. I really think that they can do it better than we can."

Workman concludes: "This is a start of a wave that you'll see from universities to move their financial systems and their ERP systems to a cloud-based system. I think that they're starting to see that it's not such a scary thing to have your data somewhere else."

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WUC12554-USEN-00