Business challenge

Queen's University wanted to facilitate compliance with new financial regulations and increase its investment in initiatives to enhance the student learning experience. How could it achieve its goals?

Transformation

Queen's University worked with IBM® Global Business Services® to upgrade its Oracle PeopleSoft solutions—helping it meet reporting requirements, avoid costs and invest in new student-facing services.

Bo Wandschneider
Chief Information Officer and Associate Vice-Principal – Information Technology Services
Queen's University

Business benefits:

CAD50,000
saved annually with online pay advices

Enables
increased investment in student-facing services

Drives
higher-quality student experiences

Queen's University
Shaping higher-quality learning experiences with new student-facing services

Founded in 1841 in Kingston, Ontario, Queen's University is one of Canada's oldest degree-granting institutions. A research-intensive institution, Queen's University employs 8,000 people and offers undergraduate and graduate programs to more than 22,100 students.

"With IBM and Oracle, we've created a solid platform to continuously improve learning experiences."

Bo Wandschneider
Chief Information Officer and Associate Vice-Principal – Information Technology Services
Queen's University

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Striving for continuous improvement

"The learning experience is a key part of the value we offer to our students," explains Bo Wandschneider, Chief Information Officer and Associate Vice-Principal – Information Technology Services at Queen's University. "Like any top-performing university, we constantly ask questions such as: 'how can we engage more effectively with our students?', 'how can we improve student outcomes?' and 'how can we enhance the quality of life on campus?'"

He continues: "We see that driving continuous improvements to the learning experience is vital to support other important strategic drivers, which include financial sustainability and student enrollment. Crucially, we must achieve these goals while maintaining compliance with ever-changing—and stringent—financial regulations."

To prepare itself to meet the challenges of the 21st century higher-education market, Queen's University integrated and standardized its administrative processes using Oracle's PeopleSoft Human Capital Management, Oracle's PeopleSoft Enterprise Financials, and Oracle's PeopleSoft Campus Solutions.

"We knew that changes to regulatory compliance reporting requirements demanded a modern, enterprise-class human capital management platform, and the university determined that Oracle offered the optimal solution to meet our specific operational requirements," says Bo Wandschneider.

Aspiring to new student-facing services

Having relied on the Oracle solutions for a number of years, the university wanted to mature its in-house approach to managing, maintaining and developing its business systems. The aim was to upgrade its Human Capital Management, Enterprise Financials and Campus Solutions to the latest versions—enabling the university to continue to meet its regulatory requirements and create a solid foundation for new student-facing services.

Bo Wandschneider comments: "Our initial implementation of Oracle's PeopleSoft solutions marked the beginning of our journey toward data-driven services. For example, our Oracle solutions are integrated with the Ontario Universities' Application Centre, which enables students to submit applications to universities across the province online.

"Calculating our tax requirements accurately is one the most important aspects of our regulatory compliance, and we need to ensure that we update our tax tables in the Oracle solution in a timely manner.

"To keep up with new electronic document interchange requirements from the application center—and to continue to receive the latest tax tables from Oracle—we needed to move to the latest supported versions of the Oracle solutions. To achieve the goal, we looked for an expert partner to help guide us through the process."

Selecting an experienced partner

To help steer the upgrade process for Oracle's PeopleSoft solutions from end to end, Queen's University engaged an expert team from IBM Global Business Services.

"We performed a thorough evaluation, and assessed a number of vendors against criteria including price, skills, resources and delivery timelines," recalls Bo Wandschneider. "Of all the vendors we considered, IBM Global Business Services impressed us the most.

"The IBM team demonstrated their experience working on successful Oracle upgrade projects in the past at other institutions we knew, and offered us the proven PeopleSoft Upgrade Factory methodology to combine on-, off- and near-shore resources.

"In addition, we felt that IBM Global Business Services performed extremely well during the interview phase of the assessment. It was clear that the IBM team combined deep technical expertise with strong project-management competencies, which gave us confidence that IBM could complete the project within the aggressive timeline we had set for ourselves."

Proven methodology, seamless upgrade

Nancy Owen, Associate Director, Enterprise Solutions at Queen's University, adds: "IBM employed the Vision to Value methodology, which brought a structured and controlled approach to our Oracle upgrades—especially during the define and design stages of the project. IBM's best practices for the implementation, combined with their suggestion to perform a dry-run cutover, helped ensure that the upgrade processes and timings were understood well in advance of the go-live date."

As a first step, Queen's University worked together with IBM Global Business Services to upgrade its PeopleSoft finance application. Following the successful completion of the finance upgrade, the university brought its payroll and human resources applications up to the current versions, and migrated its campus data to a new standalone instance of the campus application.

"Our Oracle upgrade was a complex process, and the IBM team truly exceeded our expectations," says Bo Wandschneider. "One of the most surprising aspects of the project was how seamlessly IBM brought together on-site and off-shore resources. IBM enabled us to adopt a follow-the-sun approach to accelerate certain phases of the project, and the flexibility to switch the offshore team to our time zone when we needed to solve a technical challenge—effectively doubling resources."

Facilitating compliance

With the latest versions of Oracle's PeopleSoft solutions at the heart of its organization, Queen's University has reduced the cost and complexity of meeting evolving regulatory requirements.

"By moving to the current versions of our Oracle solutions, it's straightforward to stay up to date with the latest tax requirements," explains Bo Wandschneider.

"What's more, we can easily accommodate requests for new kinds of electronic integrations to important systems such as the Ontario Universities' Application Centre—facilitating regulatory compliance."

Nancy Owen continues: "Our upgrade also enables us to utilize a number of new features in Oracle's PeopleSoft solutions to help our people to work more efficiently. One great example is Oracle WorkCenters—secure, role-specific dashboards that offer rapid access to the PeopleSoft tools that individual employees use most—including time and labor, accounts payable and general ledger.

"In the past, managing our employees' addresses, contact, emergency contact and bank account details relied on time-intensive back-office processes for our human resources team. Thanks to our work with IBM Global Business Services, we have launched employee self-service capabilities for the first time—dramatically reducing the need for manual data entry in the back office. Better still, more than 80 percent of our people have opted to receive their pay advices online through the Oracle solution—saving us CAD50,000 every year on printing costs alone."

Investing in the learning experience

By boosting productivity and uncovering new cost-efficiencies, Queen's University can redirect investment in initiatives to enhance the learning experience.

"Our work with Oracle's PeopleSoft is almost like building a house," says Bo Wandschneider. "Deploying the latest versions is a solid foundation—but we don't want to live in the basement. As we look to the future, the next steps will be to build on the platform to improve our ability to make data-driven decisions on our financials, improve our operational efficiency using deep-dive reports, and—most importantly—develop new student-facing services.

"Our collaboration with IBM Global Business Services has helped us to mature our in-house competencies with the Oracle solution, which means that we can transition away from a break-fix approach to application maintenance and adopt a proactive model—helping us to spend less time on management tasks and more time developing new capabilities."

Bo Wandschneider concludes: "Within a higher-education environment, the goal isn't to save costs—it's to find ways to avoid unnecessary spend and redirect that investment into initiatives to benefit your students. Thanks to IBM and Oracle, we've created a rock-solid platform to continuously improve the learning experience at Queen's University."

Solution components

- Oracle's PeopleSoft Human Capital Management

- Oracle's PeopleSoft Enterprise Financials

- Oracle's PeopleSoft Campus Solutions

- IBM® Global Business Services®

Take the next step

To learn more about solutions from IBM and Oracle, please contact your IBM representative or IBM Business Partner, or visit the following website: ibm.com/oracle

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