

CedarCrestone Higher Education Planning for Your HCM/CS Instance Separation



Most colleges and universities running a combined PeopleSoft Campus Solutions/Human Capital Management (CS/HCM) environment have already begun to consider the separation of their CS and HCM database instances (“the split”) and the resulting impact on their upgrades from HCM 9.0 to HCM 9.1. With both extended support for HCM 8.9 and the waived first year of extended support for HCM 9.0 scheduled to end in December 2012, many institutions are actively seeking information, tools, and advice on how to best implement the split.

The leading service provider for the the split, CedarCrestone was selected by Oracle to pilot the first client split implementation as a part of its **Early Adopter Program** at Palomar College in San Marcos, California. In October 2011, with the help of CedarCrestone, the Palomar project went live on time and within budget, and Palomar became the first institution to complete the split. During the Palomar project, we developed several **utilities** for simplifying and accelerating the database separation that are proving extremely helpful to other colleges and universities that have engaged CedarCrestone.

We continue to educate numerous institutions via live and web presentations on how to best navigate their options and formulate their split strategies. We are also working with the Higher Education User Group (HEUG) Technical Advisory Group (TAG) to make our valuable split expertise available to the many HEUG member institutions faced with separating their HCM and CS environments.

CedarCrestone offers a full range of split-related services to assist your institution in formulating and executing a smooth split implementation.

Split Assessment and Recommendation is an excellent first phase for institutions that have not yet formulated their instance separation strategy or would like to validate their approach. During this assessment, an experienced CedarCrestone technical architect will work on or off site with your technical team for approximately two weeks to provide the following services and deliverables:

- Discussion of Oracle’s four authorized instance separation approaches and the tradeoffs and rationale for including/excluding each option
- Installation of the following Assessment Utilities, which will be used to conduct the assessment:
 - Data Compare Utility
 - Customization Impact Analysis Utility
 - Data Cleansing Utility
 - Data Clean-Up Utility
- Split Enablement recommendations and an overview of CedarCrestone’s “Quick Start” utilities and services
- Recommended approach for updating customizations and procedures to accommodate the split
- Business office impact assessment with suggested testing, training, and change management activities



Let CedarCrestone help you to make an informed decision:

- What should you consider when deciding on an upgrade and split timeline for your institution?
- Which integration approach (Owner-Subscriber, Subscriber-Only, etc.) will work best for your institution?
- How much technical effort will be needed to accomplish the split at your institution?
- Does your technical team have the skills and bandwidth to perform the split in-house?
- How will the split impact your institution’s business processes? Will HR, Payroll, Admissions, Registrars, Financial Aid, and Institutional Research be affected?
- What plans should your institution be making right now to prepare for the post-split environment?



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- Post-split data governance recommendations
- Split Assessment Report summarizing findings and recommendations of the assessment

Phase 2, following a Split Assessment, is our **Database Split Quick Start** designed for institutions that believe they may be capable of performing the split work in-house but would like to streamline and jumpstart their efforts. Our split experts will assist you in developing/validating your split approach, conducting targeted split-related training, and using CedarCrestone's Quick Start Utilities. The Quick Start includes the following steps:

- Inventory of custom routines, identifying impacted routines with a recommended split approach for each
- Installation of CedarCrestone Quick Start Utilities, including, as needed:
 - Data Sync Utility – Message Enablement Utility – Performance Testing Utility
- In-depth training on:
 - Use of the CedarCrestone Quick Start Utilities
 - Technical Split Enablement and Testing: how to enable custom routines using each of the split-enablement patterns
 - Use of Integration Broker: identify services to be configured and learn how to configure and test them
- A Base Test Plan for unit and system test activities

Targeted Split and Upgrade Assistance from our experienced consultants, who can augment and streamline your split and upgrade efforts in the following ways:

- Message-enable custom routines – use our utilities to do it yourself, have CedarCrestone consultants do the work for you, or combine the two
- Configure and implement Portal and Security
- Set up integration between HCM and Campus Solutions as well as integration with third-party software
- Analyze and cleanse synchronized data
- Clean up unsynchronized data
- Implement single sign-on and Application Portal in order to minimize impact to user experience
- Plan and conduct thorough split testing and verification
- Establish and implement post-production governance strategy
- Provide onsite upgrade assistance

Many of our split and upgrade clients are also utilizing CedarCrestone's:

- **Upgrade Lab**
- **Environment Hosting**
- **Managed Services**

Regardless of what stage your institution has reached in its CS/HCM Instance Separation planning or implementation, CedarCrestone is ready to help.

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About CedarCrestone

CedarCrestone delivers industry-focused client success by providing consulting, technology, and managed services for the deployment, management, and optimization of Oracle applications and technology.