



CASE STUDY

# Shifting From Big Bang Upgrades to Monthly Releases Means Less Risk and Greater Value



**INDUSTRY:**  
**Higher Education**

**GEOGRAPHIES:**  
**Indiana**

**EMPLOYEES:**  
**5,600**

**PLANVIEW SOLUTION:**  
 **Planview®  
PPM Pro**

**PLANVIEW SOLUTION:**  
**Project Portfolio  
Management**

## CHALLENGE

Organizations moving applications to the cloud find significant advantages from their vendor managing their application upgrades. After all, who better to manage the environment and the application than those who developed it? However, by simply transferring ownership from internal IT to the application vendor, teams still have to conduct cutovers and change management with upgrades that occur on an infrequent basis. Today's enterprise software applications are either being built in a SaaS model where updates are applied on demand (without an upgrade process) or have exchanged legacy development processes for smaller, more frequent iterative releases. This means internal processes also need to be updated for these newer current release cadences.

Like many organizations accustomed to intensive and lengthy big-bang upgrades of their enterprise applications, transitioning to a monthly release cycle was intimidating for the University of Notre Dame. With limited time and resources, identifying the right functionality to test forced them to change their processes.

## SOLUTION

Notre Dame's approach was to work with Planview's process of pushing a small amount of code at one time, updating a sandbox first, and providing a week to test before applying to production. This new process enabled the organization to better manage change, ensure they are always on the latest version (with the latest security updates), and reduce workloads.



"We were nervous at first, but Planview® sends me release notes ahead of time so I know what's coming and can test based on the things that matter to us and have the highest risk. Now that we're comfortable with the monthly release process, I will never go back to the big bang approach."

– JULIE PAWLAK, IT LEAD PROJECT MANAGER,  
UNIVERSITY OF NOTRE DAME

## ABOUT THE UNIVERSITY OF NOTRE DAME

Founded in 1842, the University of Notre Dame du Lac is a private Catholic research university in Notre Dame, Indiana. Notre Dame has approximately 12,600 students, 5,600 faculty/staff, and is consistently ranked in the top 25 institutions of higher learning and named as a top 10 collegiate workplace.

## CHALLENGE: MOVING TO THE CLOUD MEANS NEW INTERNAL POLICIES AND PRACTICES

The University of Notre Dame applied major regression practices to test upgrades and patches to enterprise applications. Now with 80% of their applications in the cloud, they have shifted their policies and practices for many applications. Performing full regression testing every month was no longer feasible.

Traditionally, the team was testing each use case of larger code changes made over a greater period of time, including functionality they never used, to find every potential bug. The team was admittedly apprehensive to transition to a monthly cadence because they lacked the time and resource availability to test using their traditional methods.

## SOLUTION: EMBRACING MONTHLY PRODUCT RELEASES TO STAY CURRENT AND QUICKLY FIX ISSUES

Notre Dame realized full regression testing was no longer an efficient use of resources to keep up with product updates and fix issues faster. Planview® introduced monthly updates, allowing Notre Dame a week to test in a safe environment before going live into their environment automatically. It was a leap of faith for Notre Dame to break away from their traditional regression

testing, and it worked. Their success was due to creating a risk-based approach to taking releases.

“We were nervous at first,” admits Julie Pawlak, IT lead project manager at the University of Notre Dame. “But Planview sends me release notes ahead of time so I know what’s coming and can test based on the things that matter to us and have the highest risk. Now that we’re comfortable with the monthly release process, I will never go back to the big bang approach.”

Planview software is designed to automatically push version upgrades to its enterprise applications. When configuration is separated from releases, end users often don’t even realize there was an upgrade because they are instantly on the most recent version with all of the features on demand. Any automatic in-application changes are incremental by design, making change management easier than with a typical large upgrade.

The new monthly upgrade cadence eliminates the need for regular, large upgrades and bug reports, as Planview makes a patch and pushes it to everyone within days. Any noncritical issues are placed in the queue and pushed out with the next update.

## RESULTS: MANAGING CHANGE ONE MONTH AT A TIME

Now that the monthly release process is the new norm, Pawlak no longer needs a team of people to spend months managing large upgrades. In fact, the team rarely requires any help with the monthly updates. There is greater confidence in the integrity of their Planview applications. With Planview, they know their applications are current and issues will be fixed quickly. They immediately benefit from innovation, plus the latest security updates, without worrying about risk.

See what Planview solutions can do for your organization. View demos on demand at [Planview.com/demos](https://planview.com/demos).

