

The logo for Rutgers University, featuring the word "RUTGERS" in a large, white, serif font. Below it, in a smaller, white, sans-serif font, are the words "THE STATE UNIVERSITY OF NEW JERSEY". The background is a solid red color with a faint, large watermark of the Rutgers University seal.

THE STATE UNIVERSITY  
OF NEW JERSEY

# Administrative & Student Information Systems: Refresh Strategy & Roadmap

Treasurer's Town Hall

February 16, 2015

## ***Purposes***

- The merger with UMDNJ necessitates a migration to a single Enterprise Resource Planning (ERP) platform
- University-wide efficient, effective, and responsive business practices and systems is a foundational element of the Rutgers Strategic Plan and a way to provide real savings for strategic initiatives
- The University's move to a Responsibility Center Management budgeting approach requires changes to budget processes and supporting infrastructure
- The University must provide reliable and accessible information to our academic and administrative leadership

## ***Fit/Gap Project Conclusions***

- **Finance/HR:**
  - No significant “gaps” in required or desired functionality
  - Standardize on Oracle’s Finance/HR Solutions + Select Best-of-Breed for Certain Functions
- **Student Information System:**
  - Seek best commercial package and concentrate on business process/organizational improvements
  - Significant risk in existing system for RU – age of legacy system and “unfriendly” nature of the services
  - HIGHLY dependent on improved business processes

## ***Organizational Design and Business Process Review***

In order for the consolidated Rutgers to benefit from this project:

- Administrative business processes need to be reviewed and updated to reflect the “right practices” suggested by the “vanilla” configurations of the Oracle and other applications
- New organizational designs for service functions are critical to:
  - *Eliminating duplicative efforts* (departments, schools, central)
  - *Improving quality*
  - *Reducing “touches”*
  - *Enhancing customer service*
- Improved business processes that are *not dependent* on technology must go into effect immediately
- **Change management, communications, and training** are essential to achieve success

## ***Organizational Design and Business Process Review***

Between internal and external talent and best practices from other institutions and industries, we must generate ideas and *plans that can be implemented* related to the five pillars of administrative efficiency and effectiveness:

- Rutgers' **people** and **organizational structures**
- The business **processes**
- The **impact** of the services on **internal and external** customers
- The way that Rutgers **measures its performance** and applies metrics
- The **technologies** employed in conducting services

## ***Project Perspectives and Principles***

1. Multiple-Year Effort
2. Guided by Business Process Improvement and Organizational Review Projects
3. Consistent “best practices” for all units based on software models
4. Focus on management reporting and analytical needs up front
5. Alignment with the Responsibility Center Management budget model
6. Emphases on Change Management, Communications, and Training throughout project

## Phases in Summary

Phase	Theme	Key Projects	Timeframe
0	<b>Predecessor Projects</b>	<ul style="list-style-type: none"> <li>• Business requirements</li> <li>• Implementation roadmap</li> <li>• Reporting strategy</li> </ul>	
1	<b>Foundational Projects</b>	<ul style="list-style-type: none"> <li>• <b>Finance:</b> Foundational projects for financial applications; Procurement and expense management applications</li> <li>• <b>HR/Payroll:</b> Move all employees to single HR/Payroll system</li> <li>• <b>Student:</b> SIS package selection</li> <li>• IT Infrastructure</li> <li>• Business Process Reengineering – Finance, HR/Payroll, Student</li> </ul>	Now through mid-2016
2	<b>HCM and Student</b>	<ul style="list-style-type: none"> <li>• <b>HR/Payroll:</b> HCM (HR) upgrade; Platform as a Service (PaaS) for custom requirements; Deploy HR/Payroll BPR and reporting</li> <li>• <b>Student:</b> Complete Student Services BPR</li> <li>• IT Infrastructure: network and data centers</li> </ul>	2016
3	<b>Payroll and Student</b>	<ul style="list-style-type: none"> <li>• <b>HR/Payroll:</b> Payroll upgrade</li> <li>• <b>Student:</b> Student Services 1<sup>st</sup> round implementation</li> <li>• IT Infrastructure: desktop management and active directory</li> </ul>	2017
4	<b>Student</b>	<ul style="list-style-type: none"> <li>• <b>Student:</b> Student Services 2<sup>nd</sup> round Implementation</li> </ul>	2018

## ***Phase 0 – Predecessor Projects (2014 – mid-2015)***

- Fit Gap Project (*complete*)
- Financial Reporting and Consolidation (*nearing completion*)
  - Hyperion Financial Management System
  - Chart of Accounts Design
  - Financial Close – business process and organizational review
- Research Pre-Award System (*underway*)
  - Huron Click-Commerce, tied to Research Administration project
- Development of Reporting Strategy for All Projects (*underway*)
  - Management requirements and support
  - Warehouse/Data Store design – impact on systems implementation
  - Selection of tools and initial training strategy
- Establish Project Management Office (*underway*)
  - Project Executive, Change Management specialist, Communications specialist, Training specialist
- AIM – Integrated Workplace Management System (*live in Spring, 2015*)

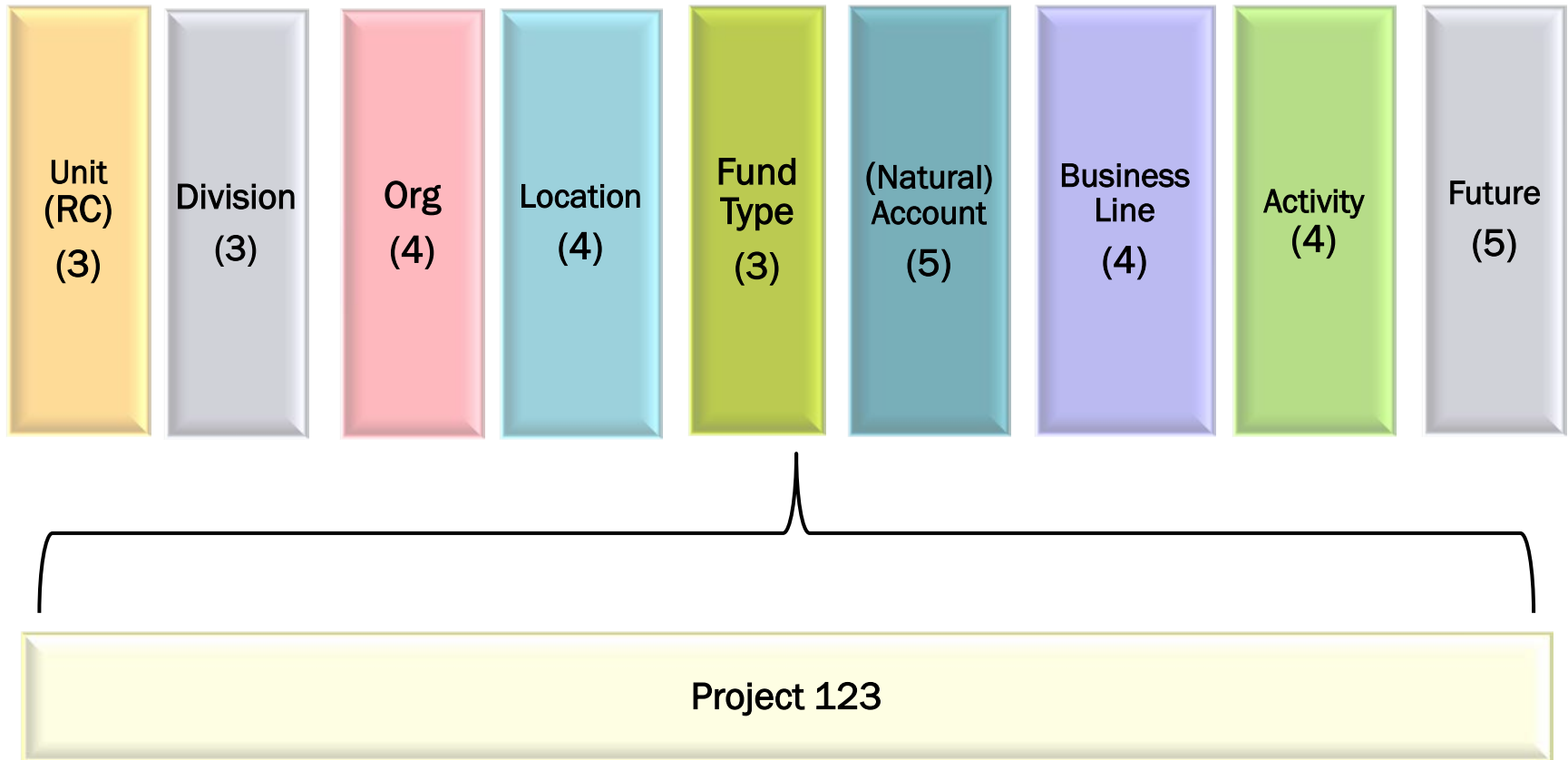


## ***Phase 1 – Foundational Projects (2015 – mid-2016)***

- **Financial Management (Oracle cloud-based)**
  - General Ledger
  - Project Accounting and Grants Management
  - Accounts Receivable
  - Cash Management and Treasury
- **Budget/Financial Planning (Hyperion applications)**
  - Position Planning (Public Sector)
  - Budget Preparation and Forecasting (Planning)
  - Capital Planning (Capital Planning)
  - Economic Model (Strategic Finance, Costing Application)
  - Management Reporting tools
- **Procurement Applications (Selection in process)**
  - “Marketplace” tools - Ordering and tracking
  - Expense management - Replacing TABER process and Focused procurement/travel card program

## Example - Hyperion Financial Management

### Account Code Combination



## ***Phase 1 – Foundational Projects*** (continued)

- Move RBHS Employees to RU HCM/Payroll (PeopleSoft 9.1)
  - Minor upgrades and cleanup
  - Set up RBHS organizations employee groups as needed
  - “Speak” to the Banner chart of accounts
  - Position management
- HR/Payroll Business Process and Organizational Review
  - Focus on eliminating customizations
  - Establish consistent, efficient, and effective processes
  - Determine management reporting requirements
- IT Infrastructure
  - Email consolidation
  - Virtualization of servers
  - First phase – upgrade of data centers
- Student Information System
  - Selection of package
  - 1<sup>st</sup> round of business process/organizational review
  - Project planning

## ***Phase 2 – HCM and Student*** (2016 – mid-2017)

- Human Capital Management (Oracle cloud-based)
  - Execute BPR initiatives for custom requirements or processes
  - Implement core Human Resources functions
  - Implement core Benefits functions
  - Platform as a Service (PaaS) for Java-based required customizations
  - Migrate *entire* employee population to HCM Cloud
  - *Retain* PeopleSoft 9.1 for Payroll, Commitment Accounting & Contract Pay
  - Deploy HR/Payroll reporting
- Student Information System
  - Complete Student Services BPR initiatives
  - Implement non-software dependent improvements
  - Select implementation partner
  - Prepare detailed project implementation plan (order based on key events)
- IT Infrastructure
  - Desktop Management and Active Directory

## ***Phase 3 – Payroll and Student (2017)***

- Payroll (Oracle cloud-based)
  - Deploy HCM Cloud Payroll
  - Integrate Time & Labor and Absence Management applications (Oracle or other)
  - Migration of Payroll, Time & Labor, and Absence Management data from 9.1
- Student Information System
  - Implement 1<sup>st</sup> round modules in event-driven time plan
  - Deploy SIS reporting
- IT Infrastructure
  - Desktop Management and Active Directory

## ***Phase 4 – Student (2018)***

- Student Information System
  - Implement 2<sup>nd</sup> round modules in event-driven time plan
  - Deploy balance SIS reporting

## ***Common Efforts Across All Projects***

- Project Management
- Change Management
  - Skills development for teams
  - Impact analyses for BPR
- Communications
  - Consistent and constant
- Training
  - Multi-modal courses (in-person, webinar, on-demand)
  - Ad hoc assistance (workshops, “problem luncheons”)
  - “Help Desk” (multi-tier)
  - Ongoing refresher and new skills courses
  - Certifications
- Reporting
  - Common tools, multiple levels
  - Single sources
  - “Help Desk”

## ***Final Thoughts***

- Rutgers can pursue fixed scope / fixed cost implementation projects and anticipate success **if** it:
  - Creates a tight control of project scope;
  - Redesigns and implements **key business processes** and **organizational structures**; and
  - Deploys a strong and dedicated Project Office and team
- Reporting **MUST** have the highest priority and be planned UP FRONT
- Executive management must reinforce that the implementation of new HR/Financial and Student Information systems will have:
  - Full support of management for the project and the organizational and business process changes;
  - Appropriate levels of funding (including on-going post-live operations), support, and resources to match the original intent; and
  - **Dedicated change management, reporting, and training efforts**

***Questions?***