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

<table>
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<tr>
<th>Phase</th>
<th>Theme</th>
<th>Key Projects</th>
<th>Timeframe</th>
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| 0     | Predecessor Projects       | • Business requirements  
                                              • Implementation roadmap  
                                              • Reporting strategy       |                                |
| 1     | Foundational Projects     | • **Finance**: Foundational projects for financial applications; Procurement and expense management applications  
                                              • **HR/Payroll**: Move all employees to single HR/Payroll system  
                                              • **Student**: SIS package selection  
                                              • IT Infrastructure  
                                              • Business Process Reengineering – Finance, HR/Payroll, Student | Now through mid-2016 |
| 2     | HCM and Student            | • **HR/Payroll**: HCM (HR) upgrade; Platform as a Service (PaaS) for custom requirements; Deploy HR/Payroll BPR and reporting  
                                              • **Student**: Complete Student Services BPR  
                                              • IT Infrastructure: network and data centers | 2016 |
| 3     | Payroll and Student        | • **HR/Payroll**: Payroll upgrade  
                                              • **Student**: Student Services 1st round implementation  
                                              • IT Infrastructure: desktop management and active directory | 2017 |
| 4     | Student                    | • **Student**: Student Services 2nd round Implementation | 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
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

- Unit (RC) (3)
- Division (3)
- Org (4)
- Location (4)
- Fund Type (3)
- (Natural) Account (5)
- Business Line (4)
- Activity (4)
- Future (5)

Project 123
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
  – 1st 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 1st 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 2nd 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?