Administrative & Student Information Systems: Refresh Strategy & Roadmap

Treasurer’s Town Hall
Rutgers University – New Brunswick
May 13, 2015
Purpose

• The integration with University of Medicine and Dentistry of New Jersey (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
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 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
# Phases in Summary

<table>
<thead>
<tr>
<th>Phase</th>
<th>Theme</th>
<th>Key Projects</th>
<th>Timeframe</th>
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</thead>
</table>
| 0     | Predecessor Projects | • Implementation roadmap  
• Business requirements  
• Reporting strategy | Immediate |
| 1     | Foundational Projects | • Business Process Reengineering: Finance, HR/Payroll, Student  
• Finance: Financial ERP, Budgeting, COA, Procurement and Expense Management applications  
• HR/Payroll: Move all employees to single HR/Payroll system  
• Student: SIS package selection  
• IT Infrastructure: Email, server virtualization | 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
  - 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
  - Project Executive, Change Management specialist, Communications specialist, Training specialist
- AIM – Integrated Workplace Management System
  - Many components are in production
Phase 1 – Foundational Projects (2015 – mid-2016)

- Financial Management (Oracle Fusion 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
  - Marketplace tools – Selected SciQuest for ordering and tracking
  - Expense management – Replacing TABER process with procurement/travel card program

- Move RBHS Employees to RU HCM/Payroll (PeopleSoft 9.1)
  - Set up RBHS organizations employee groups as needed
  - Position management

- HR/Payroll Business Process and Organizational Review

- IT Infrastructure
  - Email consolidation, Virtualization of servers, First phase – upgrade of data centers

- Student Information System
  - 1st round of business process/organizational review
  - Selection of package
Phase 1 Project Timeline

**CY 2015**

| Monthly Close/BPR | BPR Implementation |

**Financial Management**

- Chart of Account Design
- GL Implementation (Oracle Fusion Cloud) and Project Acctg/Grants Management
- A/R, Cash Management/Treasury - TBD

**Cost**

- Cost Management - TBD

**Budget / Financial Planning**

- Budget / Planning – FY16 Implementation
- Budget / Planning – FY17 Implementation
- Capital Planning, Position Management, Strategic Finance - TBD

**HR/Payroll**

- HCM/Payroll Migration (Banner to PeopleSoft 9.1)
- Business Process Review

**Procure to Pay**

- Business Process Review
- Implementation (SciQuest)

**Expense Mgmt**

- Implementation (TBD)

**Research Admin**

- RAPSS
- Wave 1 - Business Process Implementation
- Wave 2 - Business Process Implementation
- Wave 3 - Business Process Implementation

**Student**

- Business Process Review – 1st Round
- System Selection

**Today**
# Phase 1 Projects – STATUS UPDATE

<table>
<thead>
<tr>
<th>Work Streams</th>
<th>Projects</th>
<th>Target Timeline</th>
<th>Update</th>
<th>Next Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financial Management</strong></td>
<td>• G/L – Chart of Accounts Design</td>
<td>June 26, 2015</td>
<td>• Validating COA design</td>
<td>• Reviewed initial segment values. Sign-off TBD</td>
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<tr>
<td></td>
<td>• G/L – Monthly Close and BPR/Org Assmt</td>
<td>June 15, 2015</td>
<td>• Design sessions underway</td>
<td>• Share recommendations report</td>
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<tr>
<td></td>
<td>• G/L Implementation</td>
<td>July 1, 2016</td>
<td>• Implementation RFP on the street</td>
<td>• RFP evaluation process</td>
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<td></td>
<td>• Grants Management &amp; Project Accounting</td>
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<tr>
<td></td>
<td>• Accounts Receivable</td>
<td>TBD</td>
<td></td>
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<tr>
<td></td>
<td>• Cash Management and Treasury</td>
<td>TBD</td>
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<tr>
<td><strong>Budget/Financial Planning</strong></td>
<td>• Budget Planning/Forecasting – FY16 Implementation</td>
<td>August 15, 2015</td>
<td>• Drafting a communications plan/memo(s)</td>
<td>• Send communication to units</td>
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<tr>
<td></td>
<td>• Management Reporting (HFM)</td>
<td>October 2015</td>
<td>• Meeting with each respective chancellor area and the larger schools</td>
<td>• Meet with the smaller schools</td>
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<td>• Budget Planning/Forecasting – FY17 Implementation</td>
<td>October 2016</td>
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<td></td>
<td>• Position Planning</td>
<td>Deferred</td>
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<tr>
<td></td>
<td>• Capital Planning</td>
<td>TBD</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>• Economic Model (Strategic Finance)</td>
<td>TBD</td>
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<tr>
<td><strong>Cost Management</strong></td>
<td>• Cost Management</td>
<td>TBD</td>
<td>• Huron Selected</td>
<td>• Developing work plan</td>
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<tr>
<td><strong>Procurement</strong></td>
<td>• Marketplace tool</td>
<td>July 1, 2016</td>
<td>• Selected Sciquent software</td>
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<tr>
<td></td>
<td>• Expense Management</td>
<td>July 1, 2016</td>
<td>• Implementation RFP on the street</td>
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<tr>
<td><strong>HCM/Payroll</strong></td>
<td>• RBHS migration (PeopleSoft 9.1)</td>
<td>January 1, 2016</td>
<td>• Reviewing RFP responses</td>
<td>• Select Implementation Partner</td>
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<tr>
<td></td>
<td>• BPR/Org Review</td>
<td>TBD</td>
<td>• Finalizing RFP</td>
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<tr>
<td><strong>Research Admin</strong></td>
<td>• Business Process Initiatives – Wave 1</td>
<td>End of August</td>
<td>• Conducting process improvement for Wave 1 initiatives</td>
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<tr>
<td><strong>Student</strong></td>
<td>• BPR/Org Review – 1st Round</td>
<td>TBD</td>
<td>• Drafting BPR RFP</td>
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<td></td>
<td>• System Selection</td>
<td>TBD</td>
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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”
Project Management Office – Business/Management

- AVP - Strategic Fin. Initiatives: Started February 2 (Sepi Sepasi)
- Project Executive: Started March 30 (John Fcasni)
- Change Management Expert: Recruiting
- Communications Expert: Recruiting
- Training Expert: Defining position
- Reporting Specialist: Defining position
- Project Managers: 2 PMs on board from Integration Project and from Huron Research Project; others hired/contracted as needed
Overall Governance

Executive Steering Committee

Program Management Office

Administrative Information Systems (AIS) Steering Committee

Research Admin IT Steering Committee

Student Information Systems (SIS) Steering Committee

Work Streams:

- Financial Management
  - Project Team(s)

- Budget Financial Planning
  - Project Team(s)

- Procurement
  - Project Team(s)

- HR/Payroll
  - Project Team(s)

- Research Administration
  - Project Team(s)

- Student Information Systems (SIS)
  - Project Team(s)

Organizational / Process Improvement

Change Management

Communications / Training

Reporting

Program Administration
# Roles and Responsibilities

<table>
<thead>
<tr>
<th>Governance</th>
<th>Roles</th>
<th>Responsibilities</th>
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</table>
| **Executive Steering Committee** | SVP-Finance  
SVP-Administration  
SVP-Research  
Chancellors  
SVP-CIO  
SVP-AA | • Program Leadership  
• Sets program priorities and objectives  
• Reviews progress and performance against timeline(s), budget, benefits  
• Obtain resources, as needed |
| **Program Management Office** | Project Executive  
AVP-Strategic Fin. Init.  
Project Coord./Admin | • Overall oversight of PMO  
• Communicates project status to executive steering committee  
• Manages resolution of high level issues  
• Assumes overall responsibility for successful conclusion of projects |
| **Project Steering Committee(s)** | Deans  
Vice Chancellors  
Other key stakeholders | • Provides guidance and advice  
• Reviews recommendations and progress  
• Resolves Issues |
| **Project Team(s)** | Champion  
Project Manager  
Functional Lead  
Technical Lead  
Team Members | • **Champion**: Leads the work stream, overall responsibility for projects in the work stream  
• **Project Manager**: Leads the project team and manages the project scope, workplan, issues log, issue escalation/resolution  
• **Functional Lead**: Serve as the day-day lead on the business/functional components of the project  
• **Technical Lead**: Serve as the day-day lead on the technical components of the project  
• **Team Members**: Perform the tasks identified in the project plan |
Questions?