



# 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

Phase	Theme	Key Projects	Timeframe
0	<b>Predecessor Projects</b>	<ul style="list-style-type: none"> <li>• Implementation roadmap</li> <li>• Business requirements</li> <li>• Reporting strategy</li> </ul>	Immediate
1	<b>Foundational Projects</b>	<ul style="list-style-type: none"> <li>• <b>Business Process Reengineering:</b> Finance, HR/Payroll, Student</li> <li>• <b>Finance:</b> Financial ERP, Budgeting, COA, 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>• <b>IT Infrastructure:</b> Email, server virtualization</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>• <b>IT Infrastructure:</b> 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>• <b>IT Infrastructure:</b> 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

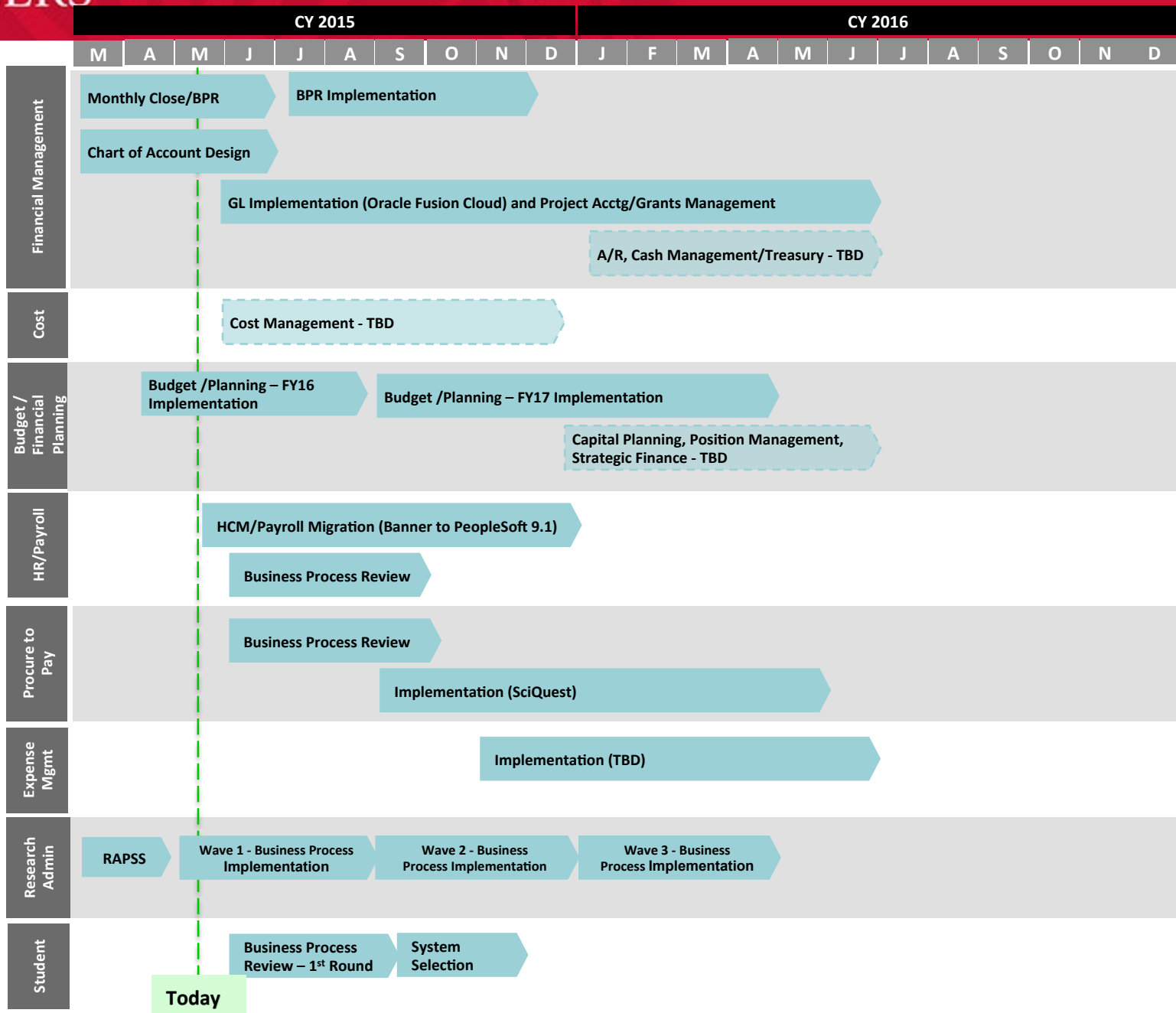
## ***Phase 0 – Predecessor Projects (2014 – mid-2015)***

- 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
  - 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**
  - 1<sup>st</sup> round of business process/organizational review
  - Selection of package

## Phase 1 Project Timeline





## Phase 1 Projects – STATUS UPDATE

Work Streams	Projects	Target Timeline	Update	Next Steps
<b>Financial Management</b>	• G/L – Chart of Accounts Design	<b>June 26, 2015</b>	• Validating COA design	• Reviewed initial segment values. Sign-off TBD
	• G/L – Monthly Close and BPR/Org Assmt	<b>June 15, 2015</b>	• Design sessions underway	• Share recommendations report
	• G/L Implementation • Grants Management & Project Accounting	<b>July 1, 2016</b>	• Implementation RFP on the street	• RFP evaluation process
	• Accounts Receivable	TBD		
	• Cash Management and Treasury	TBD		
<b>Budget/ Financial Planning</b>	• Budget Planning/Forecasting – FY16 Implementation	<b>August 15, 2015</b>	• Drafting a communications plan/memo(s)	• Send communication to units • Open Hyperion to units to enter yearly budget
	• Management Reporting (HFM)	<b>October 2015</b>	• Meeting with each respective chancellor area and the larger schools	• Meet with the smaller schools
	• Budget Planning/Forecasting -- FY17 Implementation	<b>October 2016</b>		
	• Position Planning	Deferred		
	• Capital Planning	TBD		
	• Economic Model (Strategic Finance)	TBD		
<b>Cost Management</b>	• Cost Management	TBD	• Huron Selected	• Developing work plan
<b>Procurement</b>	• Marketplace tool	<b>July 1, 2016</b>	• Selected Sciquest software • Implementation RFP on the street	
	• Expense Management	<b>July 1, 2016</b>	• Finalizing RFP	
<b>HCM/Payroll</b>	• RBHS migration (PeopleSoft 9.1)	<b>January 1, 2016</b>	• Reviewing RFP responses	• Select Implementation Partner
	• BPR/Org Review	TBD	• Finalizing RFP	
<b>Research Admin</b>	• Business Process Initiatives – Wave 1	<b>End of August</b>	• Conducting process improvement for Wave 1 initiatives	
<b>Student</b>	• BPR/Org Review – 1 <sup>st</sup> Round	TBD	• Drafting BPR RFP	9
	• System Selection	TBD		

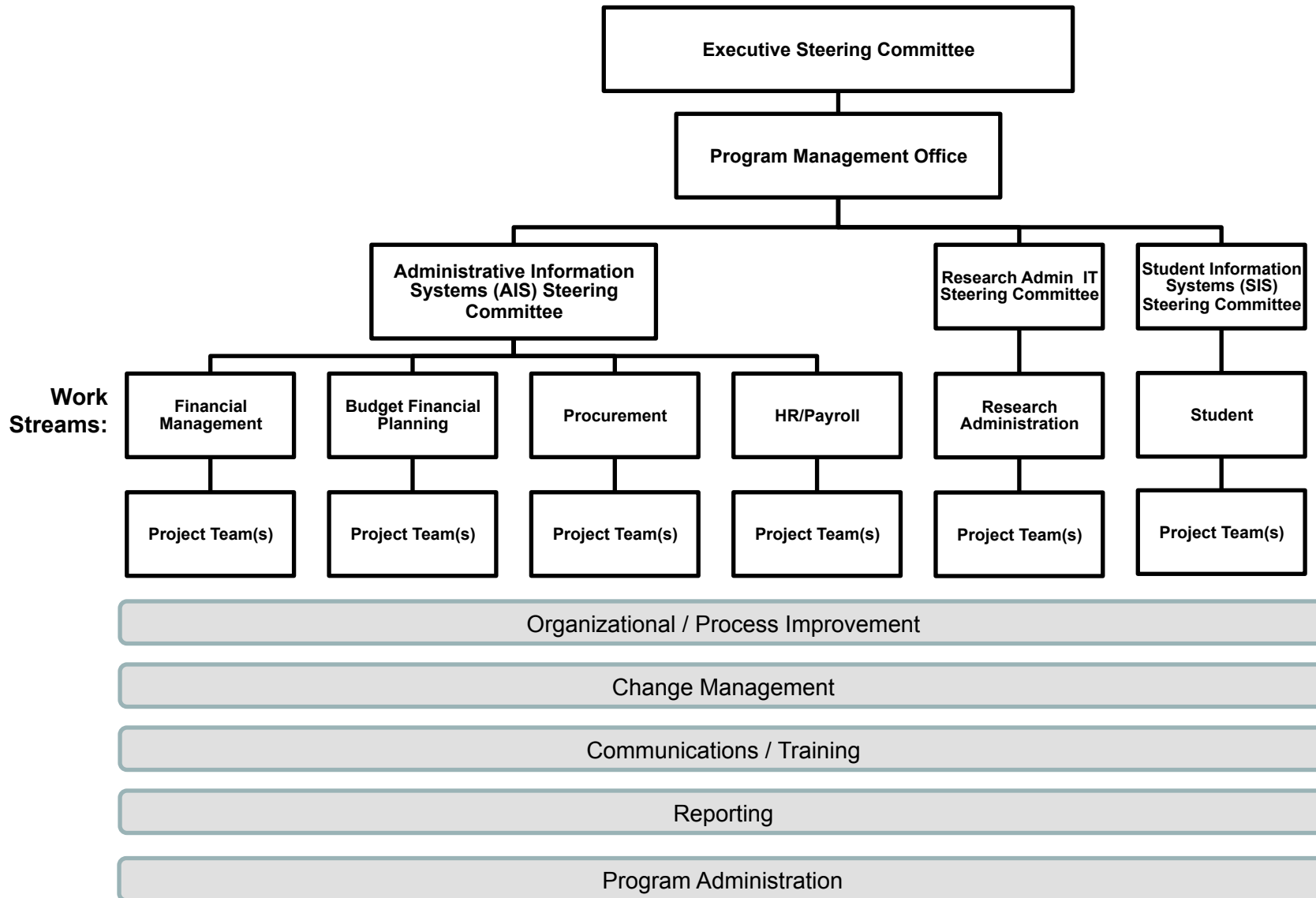
## ***Common Efforts Across All Projects***

- 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



## Roles and Responsibilities

Governance	Roles	Responsibilities
<b>Executive Steering Committee</b>	SVP-Finance SVP-Administration SVP-Research Chancellors SVP-CIO SVP-AA	<ul style="list-style-type: none"> <li>• Program Leadership</li> <li>• Sets program priorities and objectives</li> <li>• Reviews progress and performance against timeline(s), budget, benefits</li> <li>• Obtain resources, as needed</li> </ul>
<b>Program Management Office</b>	Project Executive AVP-Strategic Fin. Init. Project Coord./Admin	<ul style="list-style-type: none"> <li>• Overall oversight of PMO</li> <li>• Communicates project status to executive steering committee</li> <li>• Manages resolution of high level issues</li> <li>• Assumes overall responsibility for successful conclusion of projects</li> </ul>
<b>Project Steering Committee(s)</b>	Deans Vice Chancellors Other key stakeholders	<ul style="list-style-type: none"> <li>• Provides guidance and advice</li> <li>• Reviews recommendations and progress</li> <li>• Resolves Issues</li> </ul>
<b>Project Team(s)</b>	Champion Project Manager Functional Lead Technical Lead Team Members	<ul style="list-style-type: none"> <li>• <b>Champion:</b> Leads the work stream, overall responsibility for projects in the work stream</li> <li>• <b>Project Manager:</b> Leads the project team and manages the project scope, workplan, issues log, issue escalation/resolution</li> <li>• <b>Functional Lead:</b> Serve as the day-day lead on the business/functional components of the project</li> <li>• <b>Technical Lead:</b> Serve as the day-day lead on the technical components of the project</li> <li>• <b>Team Members:</b> Perform the tasks identified in the project plan</li> </ul>

***Questions?***