



Administrative & Student Information Systems: Refresh Strategy & Roadmap

Treasurer's Town Hall
Rutgers University – Newark
June 19, 2015

Purposes

- 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

Fit/Gap Project Conclusions

- **Finance/HR: Standardize on Oracle's Finance/HR Solutions + Select Best-of-Breed for Certain Functions**
 - No significant “gaps” in required or desired functionality
 - Worked with Oracle officials to determine “roadmap” – on which version would Rutgers go live?
 - Addition of critical functions like Project/Grants Accounting, Accounts Receivable, Treasury/Cash Management, and Position Management
 - Cloud-based – reduces IT dependency, promotes standard practices
 - Interim upgrades and applications
 - Moving RBHS-Banner employees to the PeopleSoft
 - Financial Reporting and Budget/Planning (Hyperion suite)
 - Costing information
 - “Marketplace” front-end for Procurement (SciQuest now in place for RBHS) aligned with new expense management software (*replacing* TABERs)
 - Best-of-breed package for Sponsored Projects Pre-award functions
 - In implementation now – aligning with Sponsored Projects process review

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

Phases in Summary

Phase	Theme	Key Projects	Timeframe
0	Predecessor Projects	<ul style="list-style-type: none"> • Business requirements • Implementation roadmap • Reporting strategy 	Immediate
1	Foundational Projects	<ul style="list-style-type: none"> • 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 – July 2016
2	HCM and Student	<ul style="list-style-type: none"> • 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 – July 2017
3	Payroll and Student	<ul style="list-style-type: none"> • HR/Payroll: Payroll upgrade • Student: Student Services 1st round implementation • IT Infrastructure: desktop management and active directory 	2017
4	Student	<ul style="list-style-type: none"> • Student: Student Services 2nd round Implementation 	2018

Phase 0 – Predecessor Projects (through 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 – July 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 2 – HCM and Student (2016 – July 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 balanced 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”

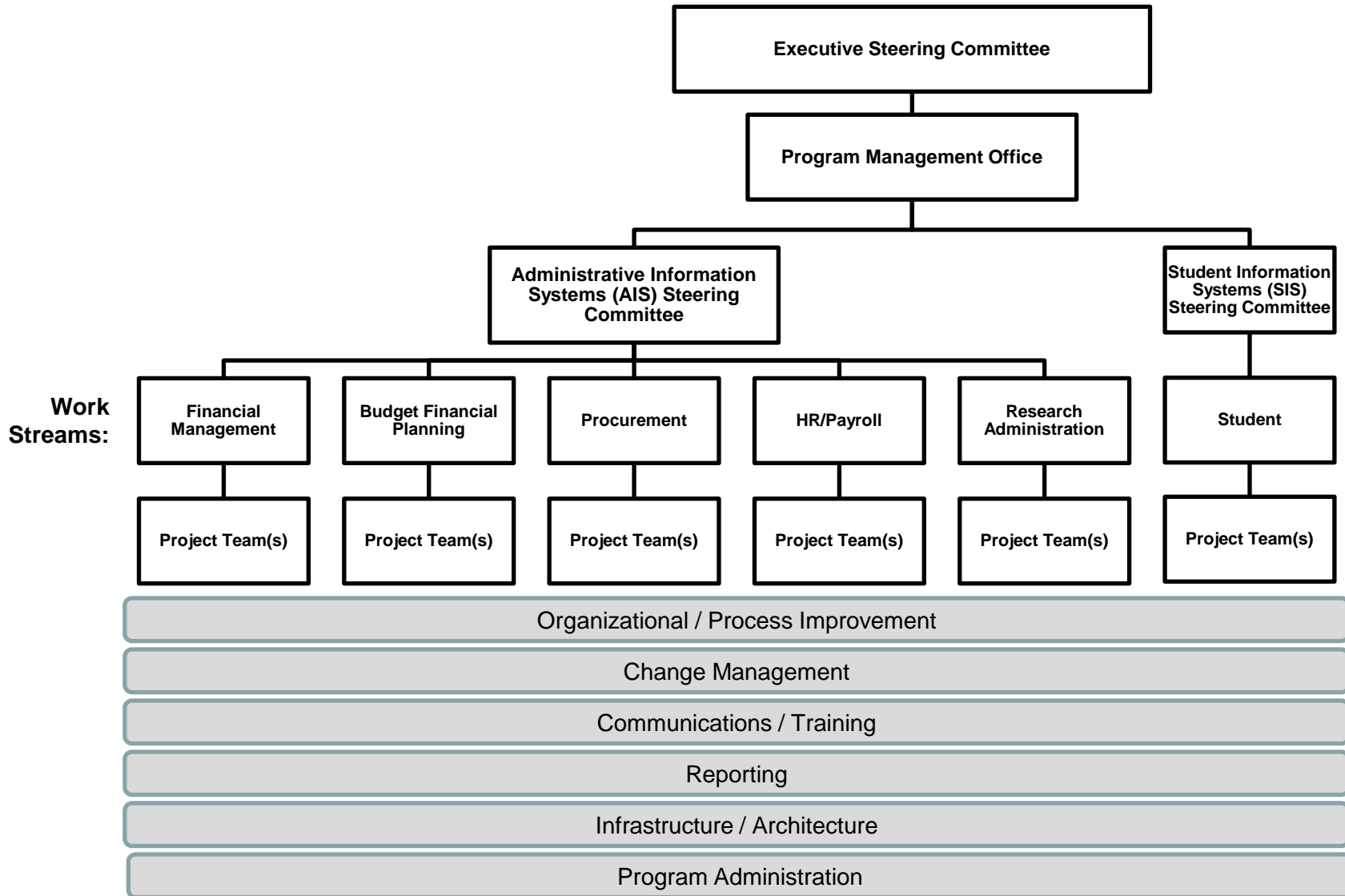
Staging of Phase 1 Projects

Workstream	Projects	Target Timeline
Financial Management	<ul style="list-style-type: none"> BPR/Organizational Review and Implementation G/L, AP, AR, Projects and Grants Implementation 	Fall 2015 July 1, 2016
Budget Planning and Forecasting	<ul style="list-style-type: none"> FY17 Hyperion Planning Implementation (central units) FY17 Hyperion Planning Implementation (all units) 	October 2015 February 2016
Cost Management	<ul style="list-style-type: none"> Hyperion Profitability and Cost Management 	End of August 2015
Procurement	<ul style="list-style-type: none"> Marketplace tool and Expense Management (including Travel Card) 	July 1, 2016
HR/Payroll	<ul style="list-style-type: none"> RBHS migration (PeopleSoft 9.1) BPR/Organizational Review 	July 1, 2016 Winter 2016
Student	<ul style="list-style-type: none"> BPR/Organizational Review – 1st Round System Selection 	Winter 2016 Spring 2016
Research Administration	<ul style="list-style-type: none"> Business Process Initiatives – Wave 1 Implementation RAPSS Implementation 	August 2015 Spring 2016

Project Management Office – Business/Management

- AVP - Strategic Fin. Initiatives: Sepi Sepasi (Started February 2)
- Project Executive: John Fcasni (Started March 30)
- 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
Executive Steering Committee	SVP-Finance SVP-Administration SVP-Research Chancellors SVP-CIO SVP-AA	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Provides guidance and advice • Reviews recommendations and progress • Resolves Issues
Project Team(s)	Champion Project Manager Functional Lead Technical Lead Team Members	<ul style="list-style-type: none"> • 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?