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

<table>
<thead>
<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               | Immediate          |
| 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 – July 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 – July 2017   |
| 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** (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

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<tr>
<th>Workstream</th>
<th>Projects</th>
<th>Target Timeline</th>
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<tbody>
<tr>
<td>Financial Management</td>
<td>• BPR/Organizational Review and Implementation</td>
<td>Fall 2015</td>
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<td>• G/L, AP, AR, Projects and Grants Implementation</td>
<td>July 1, 2016</td>
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<tr>
<td>Budget Planning and Forecasting</td>
<td>• FY17 Hyperion Planning Implementation (central units)</td>
<td>October 2015</td>
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<td>• FY17 Hyperion Planning Implementation (all units)</td>
<td>February 2016</td>
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<tr>
<td>Cost Management</td>
<td>• Hyperion Profitability and Cost Management</td>
<td>End of August 2015</td>
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<tr>
<td>Procurement</td>
<td>• Marketplace tool and Expense Management (including Travel Card)</td>
<td>July 1, 2016</td>
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<tr>
<td>HR/Payroll</td>
<td>• RBHS migration (PeopleSoft 9.1)</td>
<td>July 1, 2016</td>
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<td>• BPR/Organizational Review</td>
<td>Winter 2016</td>
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<tr>
<td>Student</td>
<td>• BPR/Organizational Review – 1st Round</td>
<td>Winter 2016</td>
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<tr>
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<td>• System Selection</td>
<td>Spring 2016</td>
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<tr>
<td>Research Administration</td>
<td>• Business Process Initiatives – Wave 1 Implementation</td>
<td>August 2015</td>
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<td>• RAPSS Implementation</td>
<td>Spring 2016</td>
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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

Executive Steering Committee

Program Management Office

Administrative Information Systems (AIS) Steering Committee

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
- Project Team(s)

Organizational / Process Improvement

Change Management

Communications / Training

Reporting

Infrastructure / Architecture

Program Administration
# Roles and Responsibilities

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<th>Governance</th>
<th>Roles</th>
<th>Responsibilities</th>
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| **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?