Administrative & Student Information Systems: Refresh Strategy & Roadmap

Treasurer’s Town Hall
Mike Gower, SVP for Finance and Treasurer
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**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.
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

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<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
  – Hyperion Financial Management System (*complete*)
  – Chart of Accounts Design
  – Financial Close – business process and organizational review (*complete*)

• Research Pre-Award System
  – Huron Click-Commerce, tied to Research Administration project

• Development of an Integrated Reporting Strategy
  – 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, 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)

• Procurement Applications
  – Marketplace Tools – Selected SciQuest for ordering and tracking
  – Expense Management – Replacing TABER process with procurement/Travel Card Program

• HR/Payroll
  – HR/Payroll Business Process and Organizational Assessment
  – Move Banner Payroll Employees to RU PeopleSoft 9.1

• Research Administration

• Student Information System
  – 1st round of Business Process/Organizational Assessment
  – Selection of package

• IT Infrastructure
  – Email consolidation, virtualization of servers, first phase – upgrade of data centers

• Integrated Management Reporting
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”
## Phase 1 – Planning Targets

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<th>Workstream</th>
<th>Projects</th>
<th>Target Timeline</th>
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| **Financial Management**       | • BPR/Organizational Assessment and Implementation  
• G/L, AP, AR, Projects and Grants Implementation | Fall 2015  
    July 1, 2016                                 |
| **Budget Planning and Forecasting** | • FY17 Hyperion Planning Implementation (central planning)  
• FY17 Hyperion Planning Implementation (unit planning) | October 2015  
    February 2016                                |
| **Cost Management**            | • Hyperion Profitability and Cost Management                                                                                  | End of August 2015                |
| **Procurement**                | • Marketplace Tool and Expense Management (including Travel Card Program)                                                        | July 1, 2016                      |
| **HR/Payroll**                 | • Banner Payroll Migration to PeopleSoft  
• BPR/Organizational Assessment                  | July 1, 2016  
    Winter 2016                                   |
| **Student**                    | • BPR/Organizational Assessment – 1st Round  
• System Selection                                | January 2016  
    Spring 2016                                    |
| **Research Administration**    | • Business Process Initiatives – Wave 1 Implementation  
• RAPSS Implementation                            | August 2015  
    Spring 2016                                    |
Questions?