

The background of the slide features a large, faint watermark of the Rutgers University seal. The seal is circular with a sunburst in the center and the words "RUTGERS THE STATE UNIVERSITY OF NEW JERSEY" around the perimeter. The word "RUTGERS" is prominently displayed in red at the top left.

# RUTGERS

THE STATE UNIVERSITY  
OF NEW JERSEY

## 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

Phase	Theme	Key Projects	Timeframe
0	<b>Predecessor Projects</b>	<ul style="list-style-type: none"> <li>• Business requirements</li> <li>• Implementation roadmap</li> <li>• Reporting strategy</li> </ul>	Immediate
1	<b>Foundational Projects</b>	<ul style="list-style-type: none"> <li>• <b>Finance:</b> Foundational projects for financial applications; 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>• IT Infrastructure</li> <li>• Business Process Reengineering: Finance, HR/Payroll, Student</li> </ul>	Now – July 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>• IT Infrastructure: Network and data centers</li> </ul>	2016 – July 2017
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>• IT Infrastructure: 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*** (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
  - 1<sup>st</sup> 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 1<sup>st</sup> 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 2<sup>nd</sup> 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

Workstream	Projects	Target Timeline
<b>Financial Management</b>	<ul style="list-style-type: none"> <li>BPR/Organizational Assessment and Implementation</li> <li>G/L, AP, AR, Projects and Grants Implementation</li> </ul>	<b>Fall 2015</b> <b>July 1, 2016</b>
<b>Budget Planning and Forecasting</b>	<ul style="list-style-type: none"> <li>FY17 Hyperion Planning Implementation (central planning)</li> <li>FY17 Hyperion Planning Implementation (unit planning)</li> </ul>	<b>October 2015</b> <b>February 2016</b>
<b>Cost Management</b>	<ul style="list-style-type: none"> <li>Hyperion Profitability and Cost Management</li> </ul>	<b>End of August 2015</b>
<b>Procurement</b>	<ul style="list-style-type: none"> <li>Marketplace Tool and Expense Management (including Travel Card Program)</li> </ul>	<b>July 1, 2016</b>
<b>HR/Payroll</b>	<ul style="list-style-type: none"> <li>Banner Payroll Migration to PeopleSoft</li> <li>BPR/Organizational Assessment</li> </ul>	<b>July 1, 2016</b> <b>Winter 2016</b>
<b>Student</b>	<ul style="list-style-type: none"> <li>BPR/Organizational Assessment – 1<sup>st</sup> Round</li> <li>System Selection</li> </ul>	<b>January 2016</b> <b>Spring 2016</b>
<b>Research Administration</b>	<ul style="list-style-type: none"> <li>Business Process Initiatives – Wave 1 Implementation</li> <li>RAPSS Implementation</li> </ul>	<b>August 2015</b> <b>Spring 2016</b>



***Questions?***