



RUTGERS

Treasurer's Town Hall

J. Michael Gower

*Executive Vice President for Finance & Administration
and University Treasurer*

Camden Campus Center

April 19, 2016

Agenda

- Transformation at-a-Glance
 - Financials Management
 - Procurement
 - Human Resources / Payroll
 - Budget
 - Change Management Strategies
- Transition to Outlook
- How You Can Be a Part of the Process
- Q&A

TRANSFORMATION AT-A-GLANCE

Financials Management

- **System Testing**

- **Objectives for system testing**

- Learn functionality of new system and business processes it supports
 - Validate new system supporting business processes
 - Identify system issues and work with testing team to resolve
 - Confirm end-to-end cycle with interfacing systems

- **Testers selected, invited to kick-off meetings – April 18, 19 and 22**

- **Testing cycles**

- **SIT1:** April 25-May 20
 - **SIT2:** June 20-July 22
 - **User Acceptance Testing:** August 22-September 16

Financials Management

- **University-Wide Road Shows**

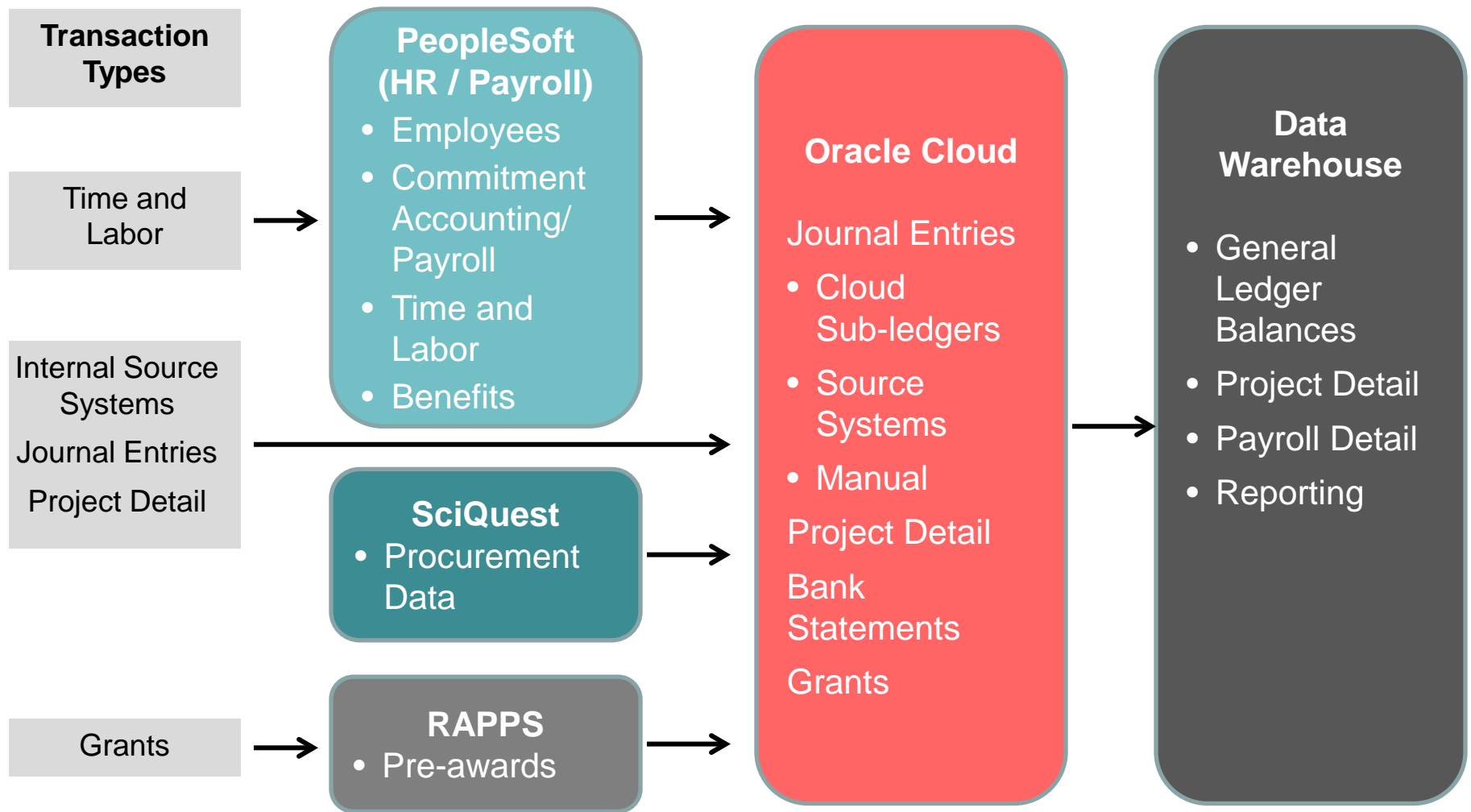
- **To be led by Steve DiPaolo, Controller and Project Champion** for the Cloud Financials Management project

- **Overview and recorded demos**

- **Seven sessions across the University between May 2-11**

- Camden May 4
 - New Brunswick/
Piscataway May 2 (College Ave)
 May 10 (Livingston)
 May 11 (Busch)
 - Newark May 3
 - RBHS May 3 (Newark)
 May 6 (New Brunswick)

Financials Management: Transaction Flow



Procurement: Procure-to-Pay

- **Preparing for Testing**

- **Testing: May 30 - August 19**
- **User Acceptance Testing: September 5 - 28**
- **Planning for training**
- **Developing conversion strategy**

- **Next Steps**

- Prepare for **campus road shows** to be held in **June**

Procurement: Expense Management

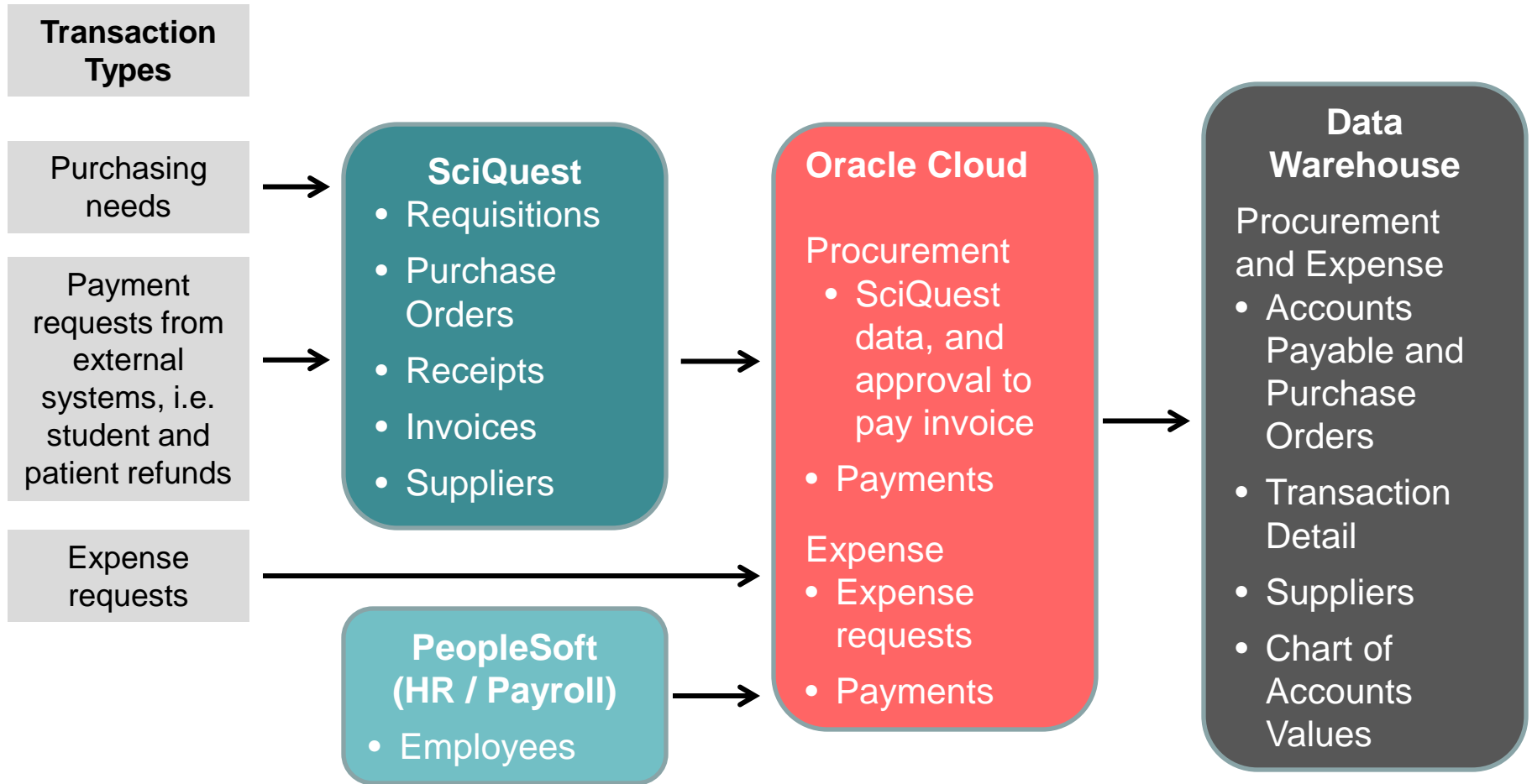
- **Preparing for Testing**

- **SIT1: April 25 - May 20** (key users from design sessions)
- **SIT2: June 20 - July 22** (Super Users)
- **User Acceptance Testing: August 22 - September 16**
(select user groups)
- **Planning for training**

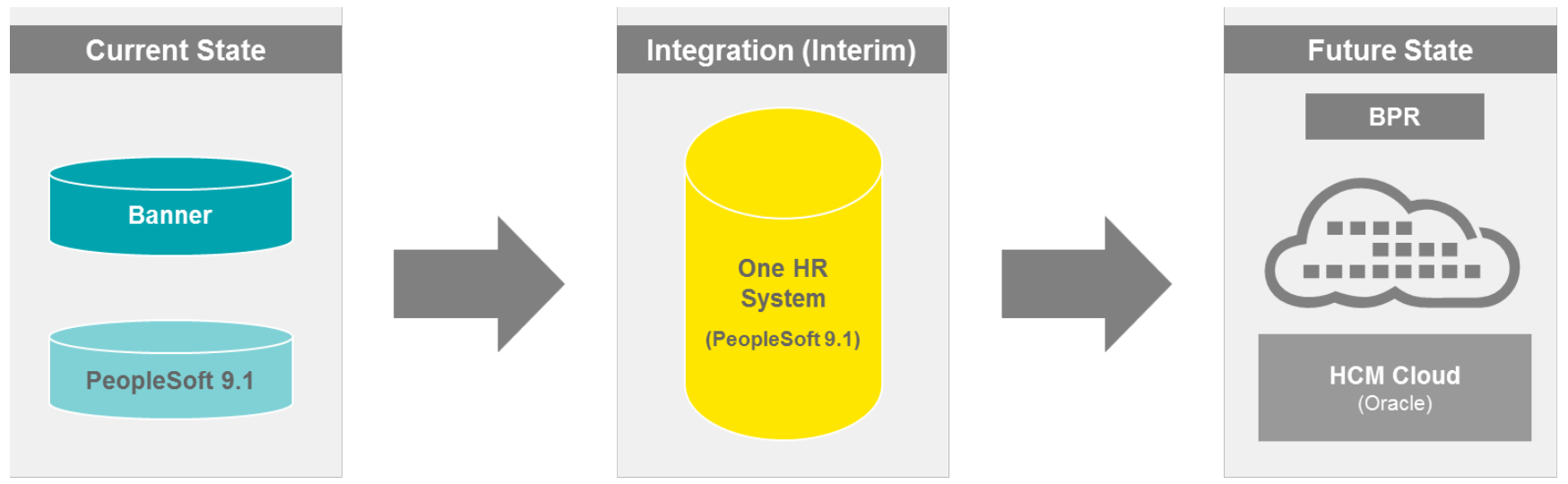
- **Next Steps**

- Prepare for **campus road shows** to be held in **June**

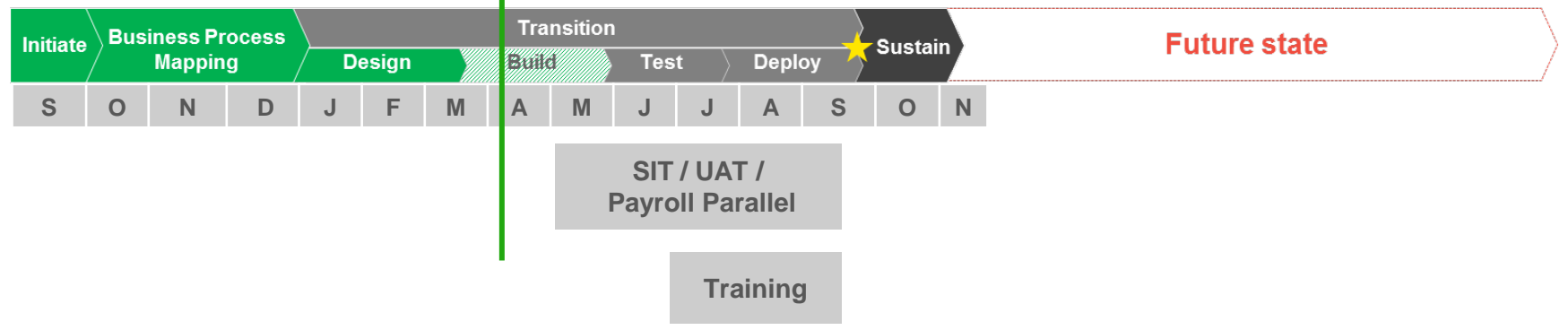
Procurement: Transaction Flow



HR / Payroll: Overview



Automation and optimization →



HR / Payroll: Transaction Flow

**Transaction
Types**

**Time and
Labor**

**PeopleSoft
(HR / Payroll)**

- Employees
- Commitment Accounting/ Payroll
- Time and Labor
- Benefits

Oracle Cloud

- Payroll Journal Entries
- Payroll Project Detail

**Data
Warehouse**

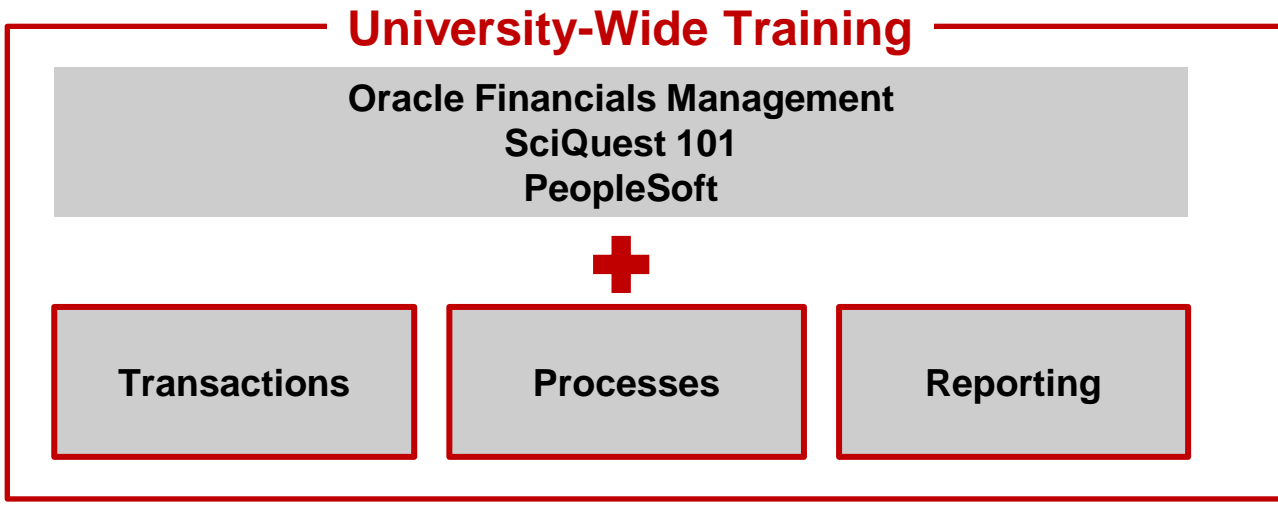
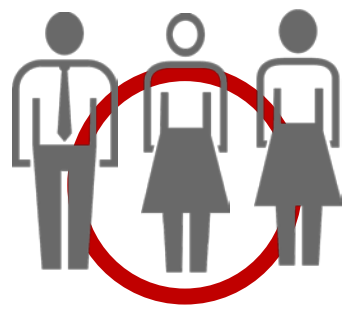
- GL Balances
- Project Detail
- Payroll Detail
- Reporting



Budget (Responsibility Center Management, Hyperion)

- **Hyperion Planning Tool is live**
- **Responsibility Centers began budgeting for FY17 in late March**
 - Continue to analyze, partner with Chancellors to finalize budgets
- **Cost Centers completed preliminary FY17 budgets Fall 2015**
 - Received updated budget information in early April
 - Will begin re-budgeting based on new information in early May
- **FY17 budgets will be finalized in mid-May**

Change Management: Training Approach



Post-Training Support: Office Hours, Job Aids, Help Desk

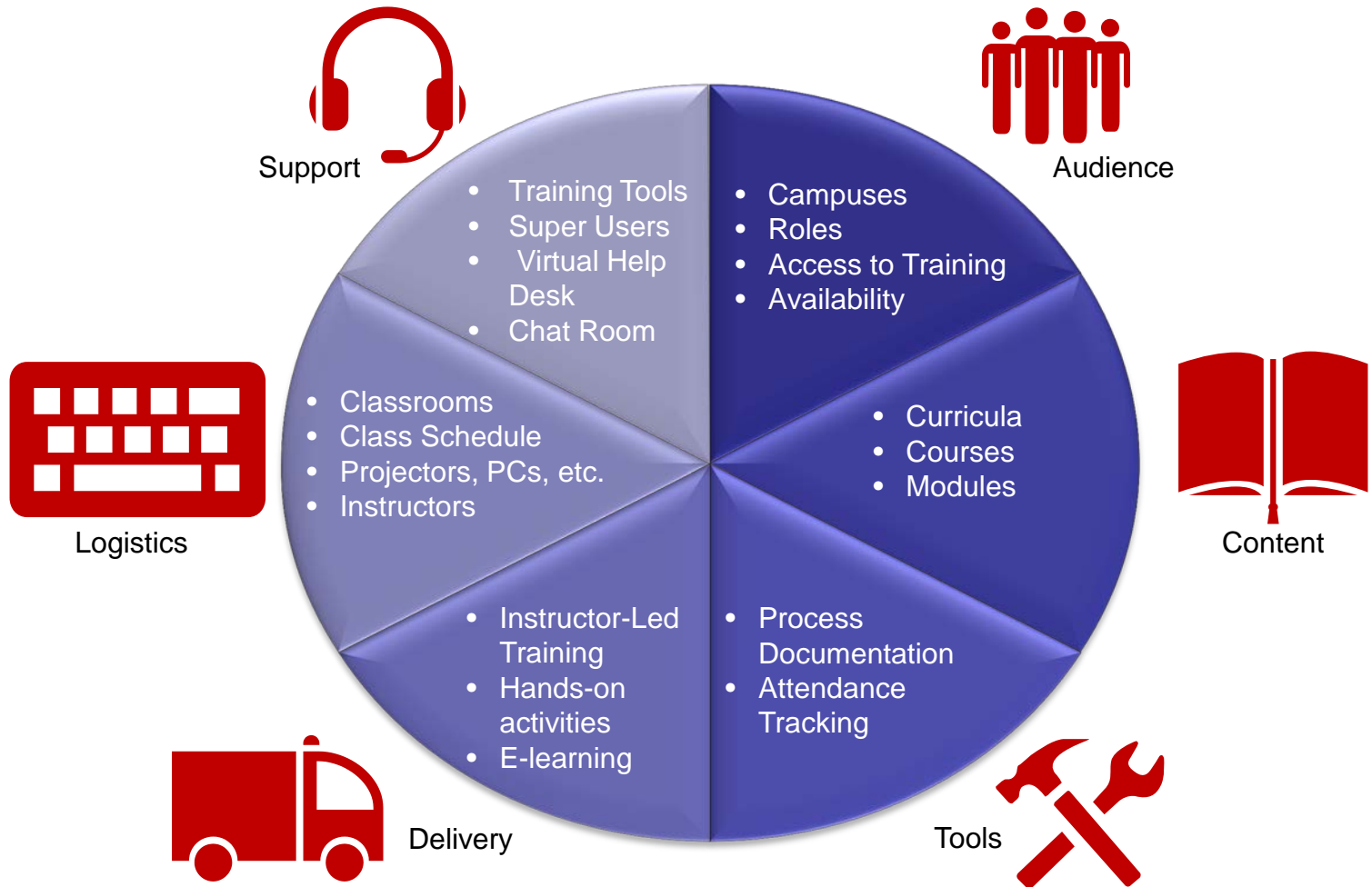
Change Management: Training Delivery Phases

Five phases of an effective training approach



Change Management: Key Elements to Training Strategy

A comprehensive training solution includes the following key elements:



Transition to Outlook

Goals

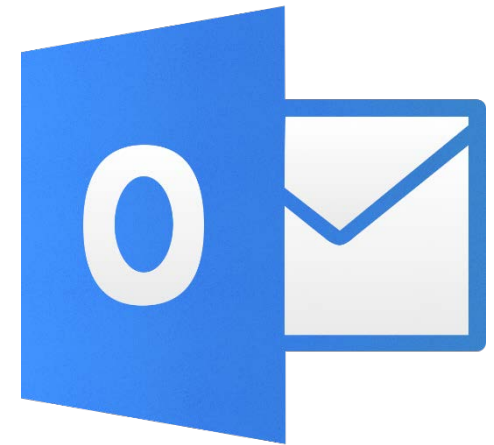
- Implement single, university-wide e-mail and calendar platform for faculty, staff, guests
- Improve collaboration across campuses, schools, departments and units; calendar management; e-mail discovery/Open Public Records Act requests
- Consolidate existing 50+ e-mail services

Progress to Date

- Secured e-mail environment in Microsoft Cloud
- Successfully converted Office of Information Technology (500 accounts)

Next Steps

- Beginning transition for RBHS (10,000 accounts)
- Partner with IT to gather mailbox information, confirm transition schedules
 - Camden planned for early-mid summer



Next Steps

- Conduct interviews for training manager
(Now)
- Perform testing for all systems
(May – September)
- Host road shows for Financials Management
(May 2-11)
- Prepare for Procurement and HR / Payroll road shows
(to be held in June)
- Continue Outlook rollout

How You Can Be a Part of the Process

- **Send questions, suggestions and feedback to:**
 - finance@rutgers.edu
- **Contact a Business Advisory or School/ Unit Representative Group member**

Visit University Finance & Administration site for mailbox addresses and contacts

- **Attend road shows for the projects**
- **Contact me**



finance.rutgers.edu/

Questions?

Next Treasurer's Town Hall

Monday, May 23

10:00 - 11:30 a.m.

College Avenue Student Center (126 College Avenue)

Multipurpose Room