



RUTGERS

Treasurer's Town Hall

J. Michael Gower

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

New Jersey Medical School

October 28, 2016

Agenda

- **Cornerstone Project Updates**
 - Human Resources and Payroll
 - RU Marketplace (Procurement)
 - Financial Management
 - Expense Management
- **Faculty**
- **Training**
- **Managing Change**
- **Next Steps and How You Can Be Involved**

HUMAN RESOURCES AND PAYROLL

Human Resources and Payroll Update

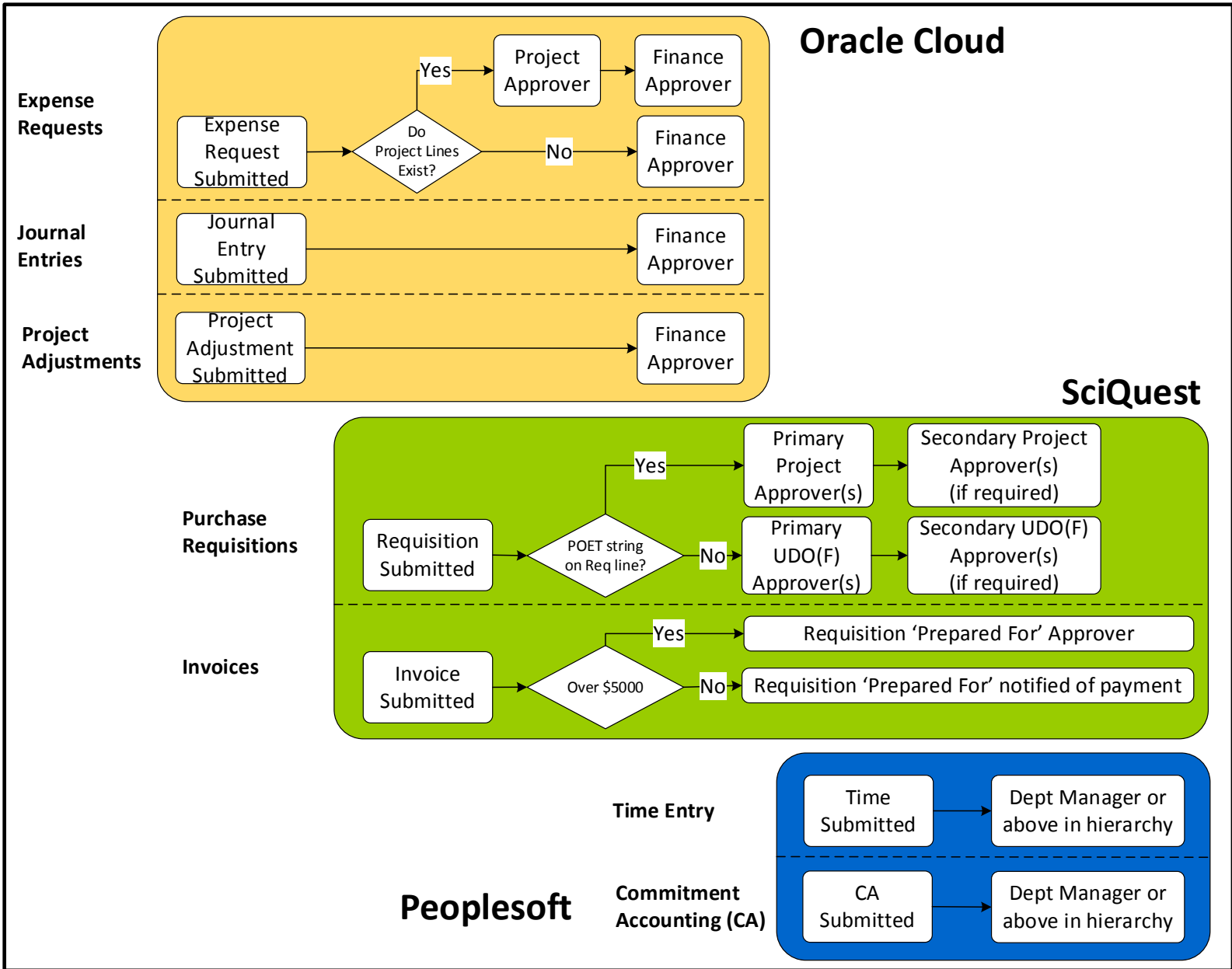
- Targeted communications with faculty and staff who transitioned from Banner to the combined PeopleSoft systems
 - Email, postal mail, FAQs and additional resources on Cornerstone
- Meeting with schools to clarify their **organizational structure** and needs, discuss approaches to **assigning approvers**, and implementing solutions
 - Meetings held with University Behavioral Health Center and Cancer Institute of New Jersey
 - Other meetings being scheduled

RU MARKETPLACE

RU Marketplace Update

- Processing Reimbursements and Payments to Suppliers
 - Payment process to expedite reimbursements and supplier payments for urgent or emergency situations. Working with Oracle to resolve, will update on solution and timing.
 - ACH payments to vendors and for reimbursements “unstuck” yesterday
- System Access
 - Requests for access being addressed as they are reported to the help desk
- Purchase Orders
 - Continuing to validate converted POs from RIAS and Banner. Expect to complete validation by November 7. Making payments on converted POs.
 - Missing supplier or invalid fulfillment center address causes PO to fail
 - Ad Hoc “Ship to” address filed available to ship to an address that is not in the pre-selected addresses in the system

FINANCIAL MANAGEMENT



Financial Management System Update

- Approval Routing (also applies to expense management)
 - Financial transactions caught in loop due to named preparers and approvers. delayed processing expense reimbursements and check requests.
 - Working through solution, which will need to be validated. Initiated payment process to expedite emergency requests.
- Converted data reconciliation effort
 - Controller's Office and Chancellor units remediating conversion issues to avoid recording duplicative corrections and to ensure chart of accounts fields are used correctly and consistently
- Targeting October 31 to update Human Resources (HR) data warehouse to replicate access to HR/Payroll and financial management reports
 - When this is complete, people who have Commitment Accounting or Time & Labor roles will have access to HR-related reports, such as payroll distribution

EXPENSE MANAGEMENT

Expense Management System: Updates and Resolutions

- ACH transfers to banks “unstuck”
- Approval Routing
 - Financial transactions caught in loop due to named preparers and approvers, delaying processing of expense reimbursements and check requests, for example
 - Working through solution, which will need to be validated. Initiated payment process to expedite emergency requests
- Reassigning Approval Requests
 - “Reassign” transfers an approval request to one or more alternate approvers. Original approver loses the ability to approve or reject the transaction.
 - “Delegate” transfers an approval request to a single alternate approver. Original approver can approve or reject the transaction. If the delegate approves the transaction, the system lists the delegate as the approver, not the person who delegated.

FACULTY

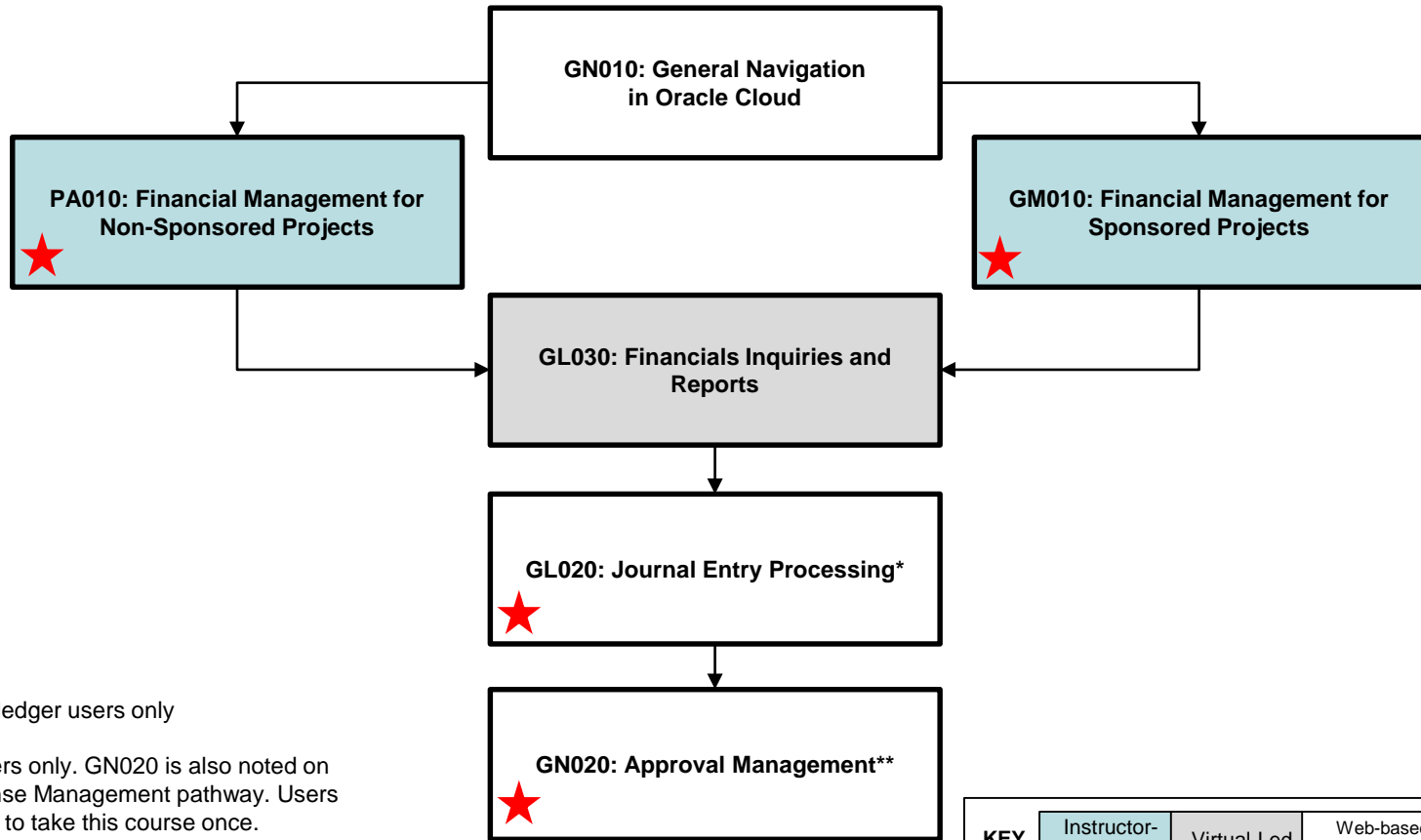
Faculty Education on the New Systems

- Faculty have the option to participate now in general online courses for grant accounting, expense management, procurement, and self-service.
- Targeted education will be available soon to help faculty learn the new systems and processes.
- These opportunities will be online, shorter, and focused on faculty-specific needs.
- A dedicated space on Cornerstone will be available for faculty to access online courses and additional resources



TRAINING

Financial Management Course Pathway (Financial Management System)



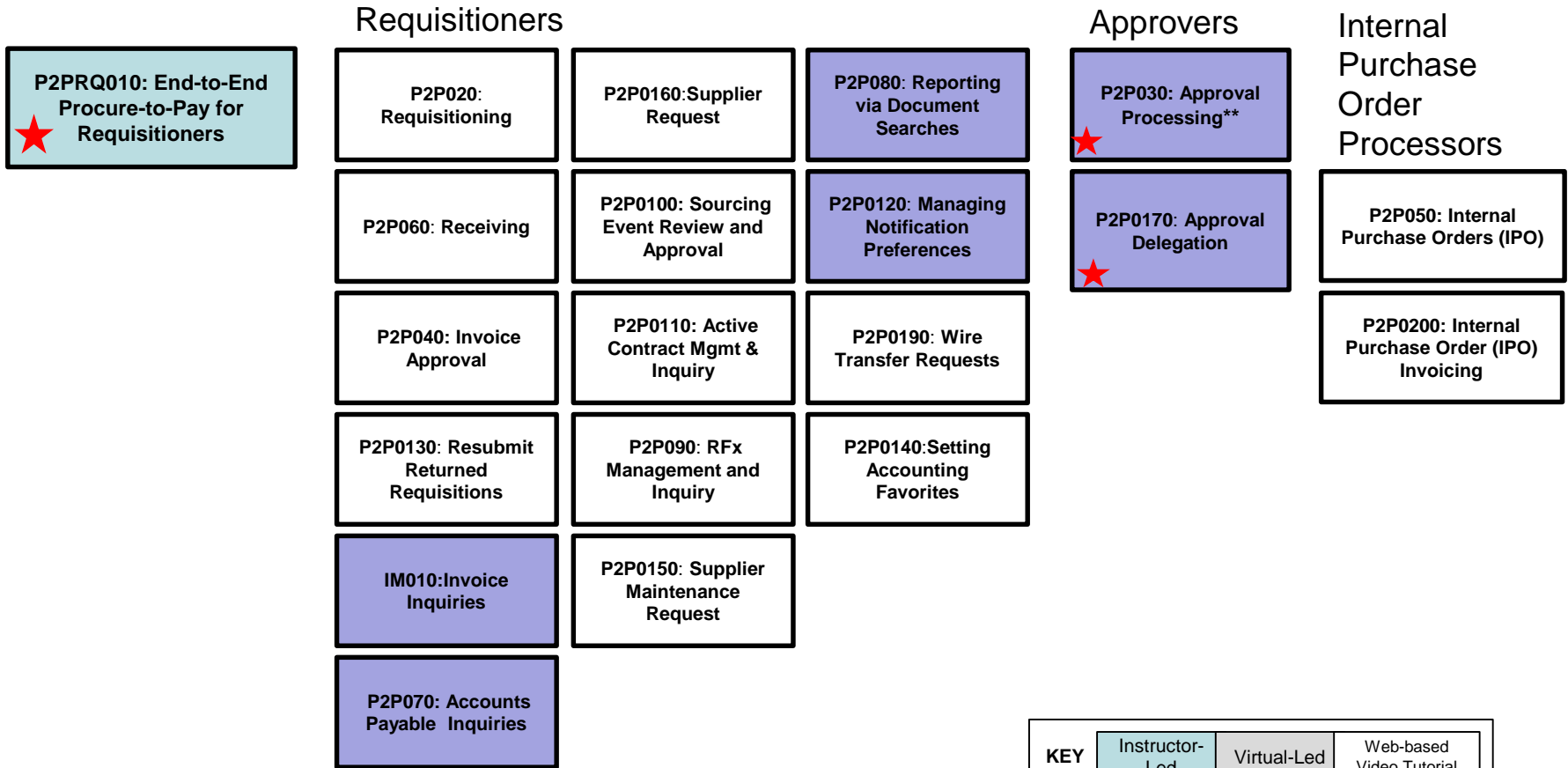
*General ledger users only

**Approvers only. GN020 is also noted on the Expense Management pathway. Users only need to take this course once.

KEY ★	Instructor-Led	Virtual-Led	Web-based Video Tutorial
	Required to access the new system		

Procurement Course Pathway (RU Marketplace)

Instructor-Led	Web-Based Video Tutorial
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KEY	Instructor-Led	Virtual-Led	Web-based Video Tutorial
★	Required to access the new system		

Web-based video tutorials can be taken in any sequence.
 **P2P030 is also noted on the Procurement Pathway for Approvers. Users only need to take this course once.

For Approver	The classes noted in purple are for specific employee who approve in RU Marketplace
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Expense Management Course Pathway

Web-Based Video Tutorials

Request for a Rutgers Employee
(Financial Management System)

**EX010: Enter and Submit
Expense Reports**

**GN020: Approval Management
(Financial Management System)****
★

Request for a Non-Employee
(RU Marketplace)

EXS010: Check Requests

P2P030: Approval Processing*
★

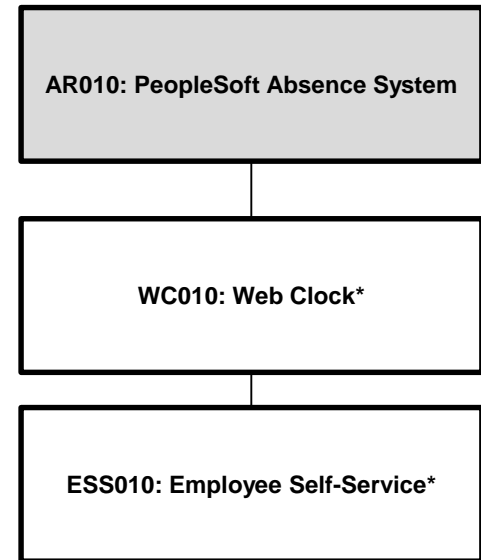
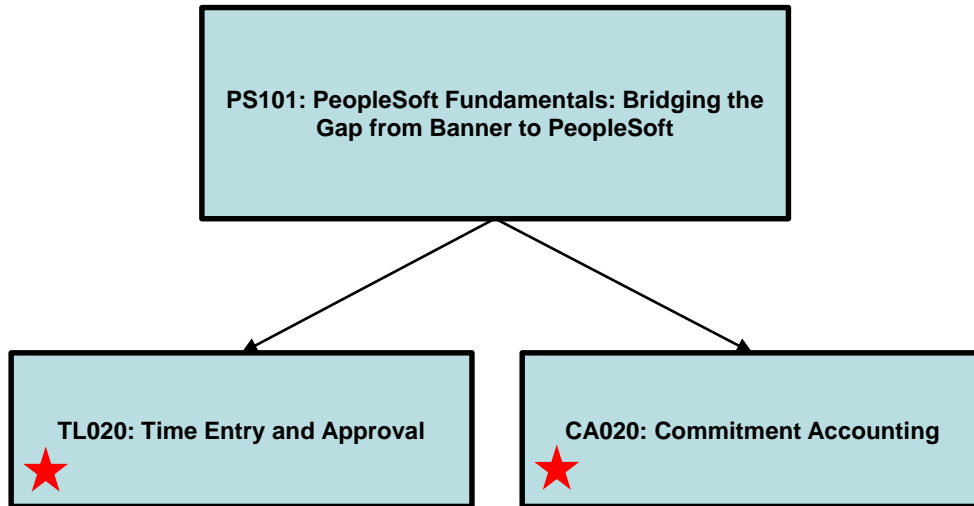
**GN020 is also noted on the Financial Management Pathway. Users only need to take this course once.

*P2P030 is also noted on the Expense Management Pathway for Approvers. Users only need to take this course once.

Online training can be taken in any sequence

KEY	Instructor-Led	Virtual-Led	Web-based Video Tutorial
★	Required to access the new system		

Human Resources and Payroll Course Pathway (PeopleSoft)



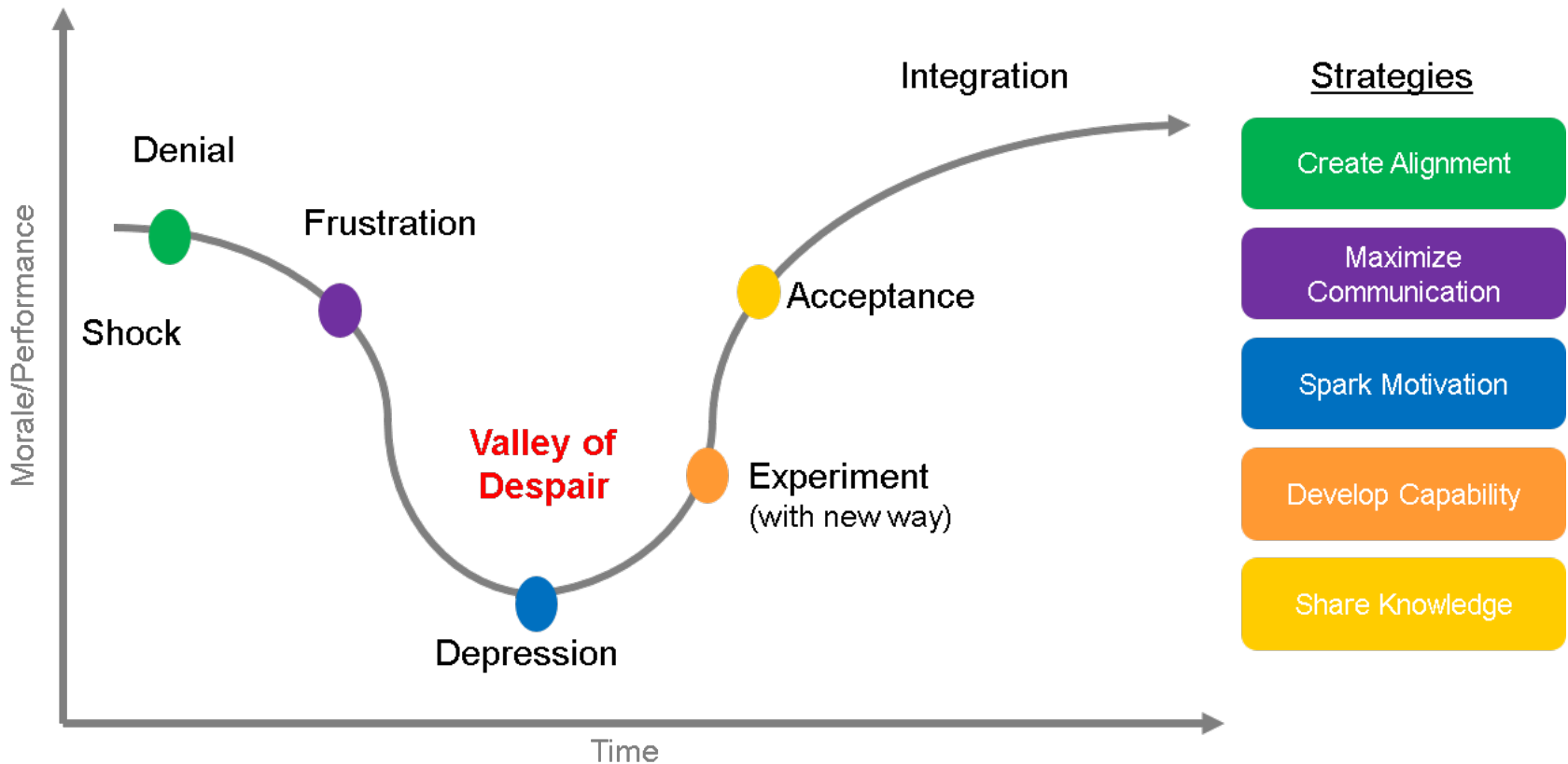
*Offered by invitation only to staff who will be responsible for time entry and approval, and employee charging instructions

Online training can be taken in any sequence

KEY ★	Instructor-Led	Virtual-Led	Web-based Video Tutorial
	Required to access the new system		

MANAGING CHANGE

Stages of the “Change Curve”



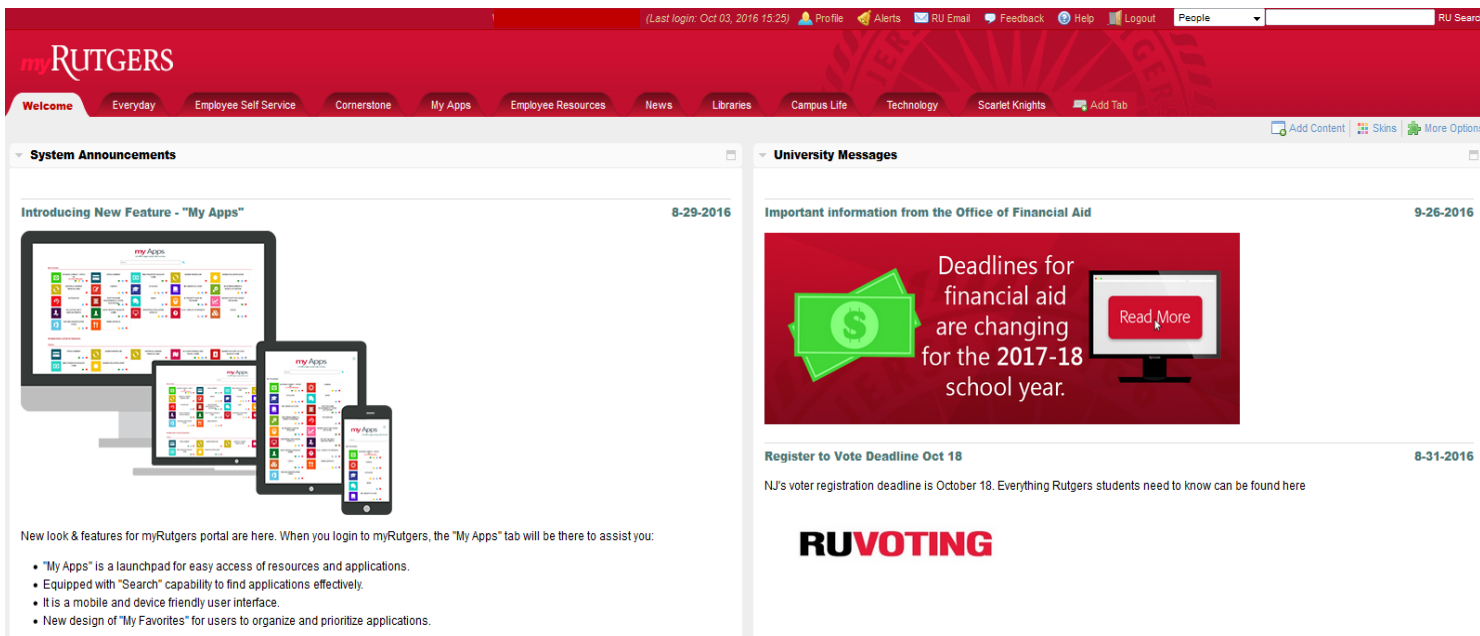
Shifting from Coping with Change to Adoption

- Continue to reinforce the urgency and need to transition to the new way of working and adopt changes
 - Successful implementation requires personal ownership and accountability by everyone
- Ensure employees participate in web-based training for new roles
 - All training and resource materials are available on Canvas
- Re-evaluate business processes in your unit to align with the new tools and processes, and to streamline practices within your unit
- Identify stakeholders in your unit and target communication to them

ACCESSING THE SYSTEMS

Access to Cornerstone Applications via myRutgers portal

Step 1: Go to my.rutgers.edu.



The screenshot shows the myRutgers portal homepage. At the top, there is a navigation bar with the myRutgers logo and a search bar. Below the navigation bar, there are several tabs: Welcome, Everyday, Employee Self Service, Cornerstone, My Apps, Employee Resources, News, Libraries, Campus Life, Technology, Scarlet Knights, and Add Tab. The main content area is divided into two columns. The left column is titled "System Announcements" and features a post titled "Introducing New Feature - 'My Apps'" dated 8-29-2016. The post includes an image of a desktop monitor, a tablet, and a smartphone, all displaying the myApps interface. Below the image, there is a paragraph of text and a bulleted list of features. The right column is titled "University Messages" and features a post titled "Important information from the Office of Financial Aid" dated 9-26-2016. The post includes an image of a computer monitor displaying a "Read More" button and a stack of green dollar bills. Below the image, there is a paragraph of text and a "RUVOTING" logo.

System Announcements

Introducing New Feature - "My Apps" 8-29-2016

New look & features for myRutgers portal are here. When you login to myRutgers, the "My Apps" tab will be there to assist you:

- "My Apps" is a launchpad for easy access of resources and applications.
- Equipped with "Search" capability to find applications effectively.
- It is a mobile and device friendly user interface.
- New design of "My Favorites" for users to organize and prioritize applications.

University Messages

Important information from the Office of Financial Aid 9-26-2016

Deadlines for financial aid are changing for the 2017-18 school year.

Register to Vote Deadline Oct 18 8-31-2016

NJ's voter registration deadline is October 18. Everything Rutgers students need to know can be found here

RUVOTING

Access to Cornerstone Applications via myRutgers portal

Step 2: Log in using your NetID and password.

RUTGERS Central Authentication Service (CAS)

Please Log In

You have requested access to a site that requires Rutgers authentication. This is not a public network and explicit authorization is required. For security reasons, please Log Out and Exit your web browser when you are done accessing services that require authentication!

Enter your Rutgers NetID and Password

NetID:

Password:

Ensure proper security — keep your password a secret

Authentication Type: Default

Notify me before logging me into other sites.

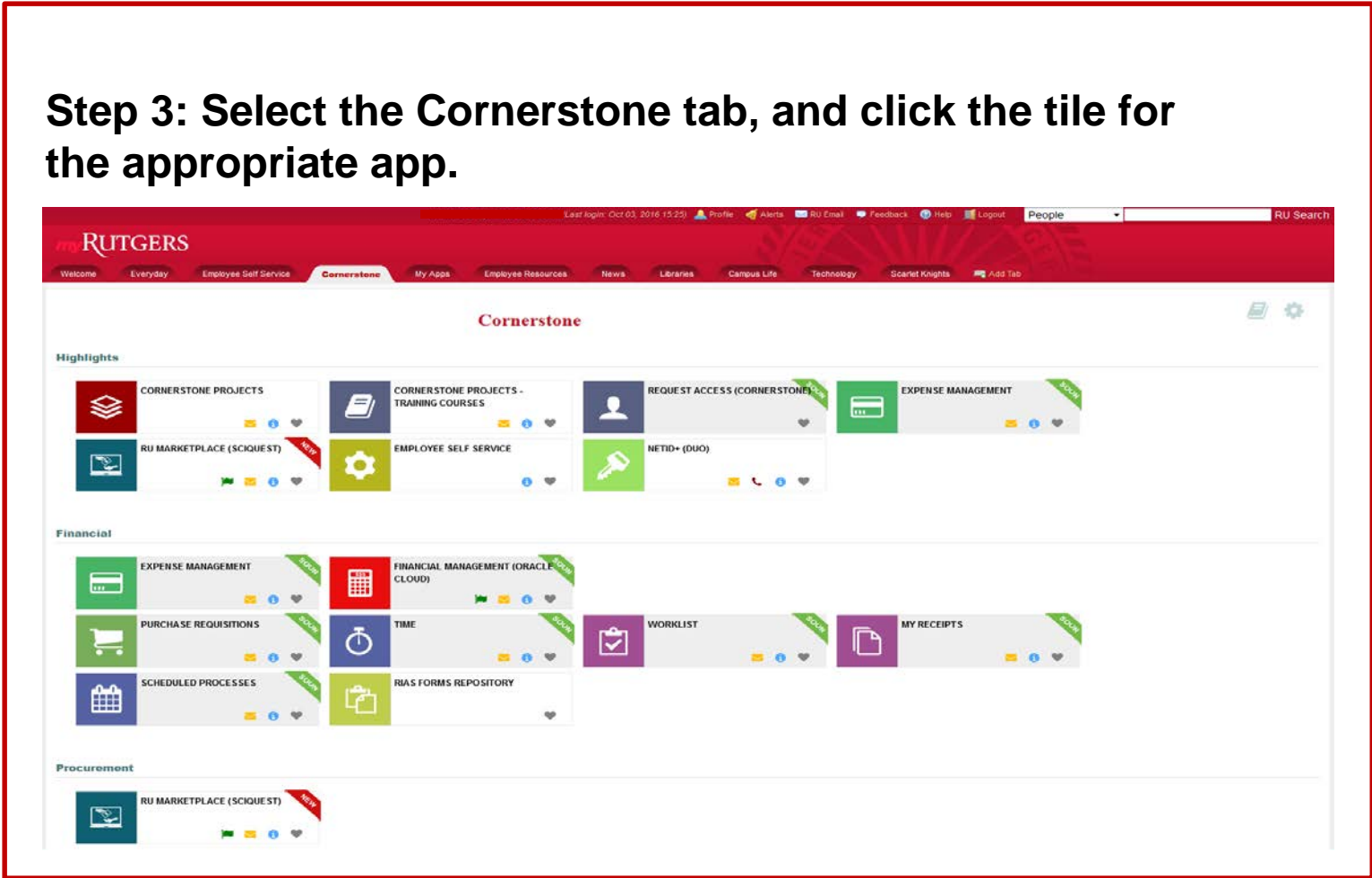
To protect your privacy, please logout and exit your browser when you are done accessing services that require authentication

[Forgotten NetID or password?](#) First-time users, [activate your NetID.](#)

Links to campus web sites: [Camden](#), [Newark](#), [New Brunswick/Piscataway](#), [Rutgers University](#).
For assistance, contact the Help Desks in: [Camden](#), [Newark](#), or [New Brunswick/Piscataway](#).

Access to Cornerstone Applications via myRutgers portal

Step 3: Select the Cornerstone tab, and click the tile for the appropriate app.



NEXT STEPS AND HOW YOU CAN BE INVOLVED

Next Steps

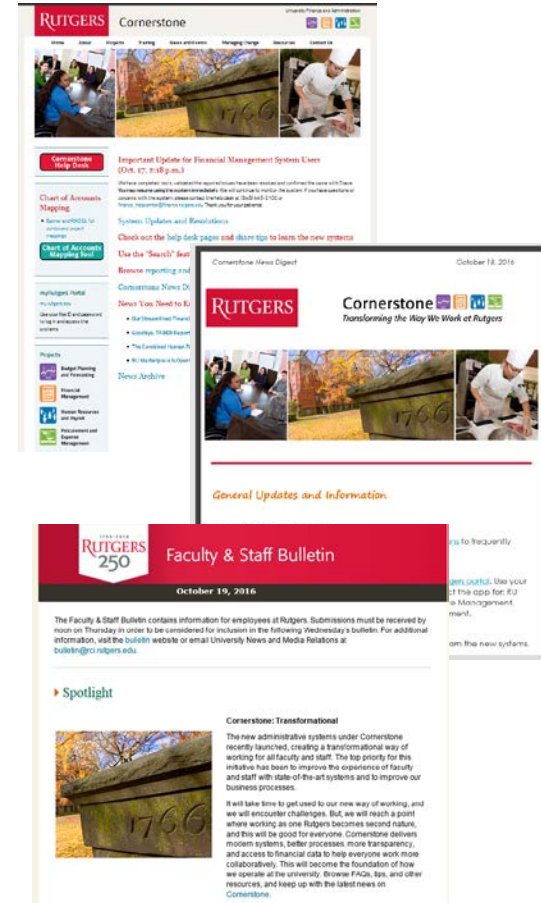
- Work within your Chancellor or central administration unit to determine how the changes will **impact your unit**
- Mobilize at the **local level**, utilizing available guidelines and tools



How You Can Be Involved

- **Stay connected**
 - Cornerstone website
 - Newsletters
 - Treasurer’s Town Hall

- **Send questions, suggestions and feedback to:**
 - cornerstone@rutgers.edu
 - Help Desk Staff
 - Procurement and Expense Management
 - Human Resources and Payroll
 - Financial Management



cornerstone.rutgers.edu

Cornerstone Help Desks

Customer Service. Issues Resolution. Satisfaction.

Human Resources and Payroll

Monday-Friday
7:30 a.m.-5 p.m. Eastern

(848) 932-3888

hrpayroll_helpcenter
@hr.rutgers.edu

Procurement and Expense

Monday-Friday
8 a.m.-6 p.m. Eastern

(848) 932-4375

procurement_helpcenter
@finance.rutgers.edu

Financial Management

(beginning Oct. 10)

Monday-Friday
8 a.m.-6 p.m. Eastern

(848) 445-2100

finance_helpcenter
@finance.rutgers.edu

Calls and emails will be returned within one business day.