Administrative and Student Information Systems Transformation Overview
“Build a single, modern Enterprise Resource Planning system that will serve as the information technology foundation for the entire University and its administrative and student systems.”

– President’s 2015 Report to the University Senate
• Foundational element of the University’s strategic plan that will dramatically improve how we work together as one Rutgers

• An important step toward creating a unified identify and culture, standardizing practices, and improving collaboration across:
  – Rutgers University–Camden
  – Rutgers University–Newark
  – Rutgers University–New Brunswick
  – Rutgers Biomedical and Health Sciences

• We will strengthen our long-term performance and sustainability by becoming more effective, efficient and responsive
A strategic project to transform the administrative and student information systems and processes for Rutgers University.

### Cornerstone Projects

- **Budget Planning and Forecasting**
  - University Budget Office
  - Platform: Hyperion

- **Financial Management**
  - Office of the University Controller
  - Platform: Oracle

- **Human Resources and Payroll**
  - University Human Resources
  - Platform: PeopleSoft

- **Procurement**
  - University Procurement Services
  - Platform: RU Marketplace

- **Expense Management**
  - University Procurement Services
  - Platform: Oracle

- **Student Experience Improvement Initiative**
  - Student Account Services, Financial Aid and Registrar

- **Research Administration**
  - Office of Research and Economic Development, incl. the Division of Grant and Contract Accounting

- **Reporting / Analytics**

- **Customer Relationship Management**

### Enabling Platforms

- **Course Registration Website**
  - Register for Cornerstone training

- **Canvas**
  - Access training and support materials

- **myRutgers portal**
  - Access to Cornerstone systems

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*Transforming the Way We Work at Rutgers*
NOTE: HFM (Hyperion Financial Management), HPCM (Hyperion Profitability and Cost Management), DRM (Data Relationship Management), Planning (Hyperion Planning)
Procurement Transaction Flow

**Transaction Types**
- RU Marketplace
  - Requisitions
  - Purchase Orders
  - Receipts
  - Invoices
  - Suppliers
- Oracle Cloud
  - Procurement
    - RU Marketplace data, and approval to pay invoice
    - Payments
    - Expense
    - Expense requests
    - Payments
- Data Warehouse
  - Procurement and Expense
    - Accounts Payable and Purchase Orders
    - Transaction Detail
    - Suppliers
    - Chart of Accounts Values

**Payment requests from external systems, i.e., student and patient refunds**

**Expense requests**

**PeopleSoft HR/Payroll**
- Employees

**Purchasing needs**

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**Payment requests from external systems, i.e., student and patient refunds**

**Expense requests**

**PeopleSoft HR/Payroll**
- Employees
Human Resources/Payroll Transaction Flow

Transaction Types
- Time & Labor
- HR Transactions

PeopleSoft HR/Payroll
- Employees
- Commitment Accounting/Payroll
- Time & Labor
- Benefits

Oracle Cloud
- Payroll Journal Entries
- Payroll Project Detail

Data Warehouse
- General Ledger Balances
- Project Detail
- Payroll Detail
- Reporting

Payroll Detail
Process Steps
1. Cost Pool Budgets are input to Planning by Cost Centers.
2. Allocation Metrics and Cost Pool Budgets are loaded to HPCM.
3. Cost Pool Allocations are generated in HPCM and sent to Planning to inform the RC budget process.
4. Responsibility Center Budgets are input to Planning.
5. Budgets are passed from Planning to Cloud for reporting.
6. Actuals are passed to Forecasting and Planning from Cloud during period close. Forecasts are periodically passed back to Cloud.
New systems will be thoroughly tested using a logical sequence that closely controls the introduction of new testing variables.

**Test Execution**

**System Integration Testing (SIT Cycle 1)**

- Confirms that business processes work as designed across an integrated set of modules and integration partner applications.

**System Integration Testing (SIT Cycle 2)**

- Involves a second execution of the integration test plan with a second run of conversions and additional configurations identified during SIT1.

**User Acceptance Testing (UAT)**

- Business scenarios confirm that individuals can perform their jobs and provides a “day-in-a-life” experience to the user before production go-live.

All testing participants will be trained prior to the start of SIT1.

- Functional Teams and “Super Users”
- “Super Users”
- End Users

Testers will enter transactions, verify and reconcile data.
Developing Our People: Three-Tiered Training Approach

**Key elements to further develop skills in finance areas across central and campus units**

| Foundational Courses | • High-level instruction covering basic financial terms and concepts, understanding work and workflows in Finance units  
                      | • Required training for all University Finance & Administration employees, and users with a financial role |
|----------------------|------------------------------------------------------------------------------------------------------------------|
| Intermediate Courses | • Based on current course pathways, which are being updated to address current processes and training gaps  
                      | • Ongoing training for reporting |
| Specialized Courses  | • Intended for subject matter experts |

- **Embed Business Processes**: All courses to include business processes to support employee understanding of Finance workflows
- **Recognition and Career Advancement**: Establish certificate program for intermediate and specialized courses; enable staff recognition and means for staff to advance careers at Rutgers
- **Streamline Registration**: Provide one registration method for all training offerings to simplify the “how to” for the end user
### Five phases of an effective training approach

<table>
<thead>
<tr>
<th>Prepare Me</th>
<th>Tell Me</th>
<th>Show Me</th>
<th>Let Me</th>
<th>Help Me</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Change champions</td>
<td>• Classroom dialogue</td>
<td>• Transactional demonstrations</td>
<td>• Hands-on exercises</td>
<td>• Support email / phone/live chat</td>
</tr>
<tr>
<td>• Communications</td>
<td>• Process overview and context</td>
<td>• Process flows</td>
<td>• Practice in training environment</td>
<td>• Post go-live support</td>
</tr>
<tr>
<td>• Practice in development environment (sandbox)</td>
<td>• Course slides</td>
<td>• How it fits into my work</td>
<td>• Open labs</td>
<td></td>
</tr>
<tr>
<td>• Road shows</td>
<td></td>
<td>• Simulations</td>
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</tbody>
</table>
A comprehensive training solution includes…

- **Support**
  - Training Tools
  - Super Users
  - Virtual Help Desk
  - Chat Room

- **Logistics**
  - Classrooms
  - Class Schedule
  - Projectors, PCs, etc.
  - Instructors

- **Delivery**
  - Instructor-Led Training
  - Hands-on activities
  - E-learning

- **Content**
  - Curricula
  - Courses
  - Modules

- **Tools**
  - Process Documentation
  - Attendance Tracking

- **Audience**
  - Campuses
  - Roles
  - Access to Training
  - Availability
PHASE 1
<table>
<thead>
<tr>
<th>Key Activities</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Budget Planning and Forecasting:</strong> Ownership and accountability of financial resource planning at the responsibility center level</td>
<td>Oct. 2016</td>
</tr>
<tr>
<td><strong>HR/Payroll – Data Migration:</strong> Integrated two parallel systems and processes for business services and creating a single payroll system</td>
<td>Dec. 2016</td>
</tr>
<tr>
<td><strong>Expense Management:</strong> Replaced lengthy, complex, paper-based process with streamlined online system</td>
<td>Jan. 2017</td>
</tr>
<tr>
<td><strong>Procurement (RU Marketplace):</strong> Single purchasing and payables process and tool, and standardized internal purchase order processes for internal suppliers</td>
<td>May 2017</td>
</tr>
<tr>
<td><strong>Financial Management:</strong> • Monthly close process initiated, and identified accounting and payroll posting issues addressed</td>
<td>Mar. 2017</td>
</tr>
<tr>
<td><strong>Grant and Contract Accounting:</strong> • Award end date corrections complete to offset system functionality • Expense adjustments to correct conversion • Cost transfer process for Sponsored projects (SWRJ and CISF forms)</td>
<td>May 2017</td>
</tr>
<tr>
<td></td>
<td>Jun. 2017</td>
</tr>
<tr>
<td></td>
<td>Aug. 2017</td>
</tr>
</tbody>
</table>

SWRJ – Salary and Wage Redistribution and Justification
CISF – Change in Source Funds
PHASE 2
“Let Go” Recognize past successes, but prepare for the change

Lead Socialize new model and structure to enable new behaviors to help employees embrace change

Improve Processes Address issues, achieve operational excellence, and realize value

Adjust Organization Realign organization to become a best-in-class organization

Deploy Systems Implement systems (HCM Cloud, Taleo, etc.)

Streamlined and integrated Human Resources services

Stage 2

Stage 3

Stage 4

Stage 5

HR Business Process Redesign: Our Transformation Journey
Student Experience Improvement Initiative

Fall 2015 – Spring 2016

Initial Assessment  
Recommended opportunities to improve the student experience

Summer 2016 – Spring 2017

Enrollment Management Service Alignment  
Service Level Agreements between central and campus functions

Financial Aid Compliance & Operational Improvements  
Implementation of process and policy enhancements

One Stop Operating Model Development  
One Stop model development

Spring 2017 – Summer 2017

Admissions & Registrar Business Process Redesign  
Implementation of process and policy enhancements

Virtual One Stop Design  
Design for websites and online self-service for students

Student Information System (SIS) Requirements Gathering  
Specific business needs and use-cases for future SIS selection

Summer 2017 – Fall 2017

Student Accounts Business Process Redesign  
Implementation of process and policy enhancements

Activity Analysis for Enrollment Management & Student Accounts  
Recommended structure for one stop and financial aid compliance

One Stop Implementation Support  
Ongoing progress towards virtual and physical one stops

Legend:
- Workstream
- Key Outcome

Cornerstone
Transforming the Way We Work at Rutgers
**The Student Experience: One Stop Service Center**

<table>
<thead>
<tr>
<th>Students…</th>
<th>Recruitment</th>
<th>Graduation</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Seamless, consistent experience</td>
<td></td>
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</tbody>
</table>

**…interact through…**

<table>
<thead>
<tr>
<th></th>
<th>Web</th>
<th>E-mail</th>
<th>Phone</th>
<th>In-Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Access to common services, driving <strong>student-first philosophy</strong></td>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

**…supported by…**

<table>
<thead>
<tr>
<th></th>
<th>Generalists</th>
<th>Specialists</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Cross-trained <strong>generalists</strong> (single point of contact for triage, support); and <strong>specialists</strong> (complex inquiries)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**…to process transactions across…**

<table>
<thead>
<tr>
<th></th>
<th>Financial Aid</th>
<th>Student Accounts</th>
<th>Admissions</th>
<th>Registrar</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Streamline and manage high volume transactions</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**…using integrated technology systems**

<table>
<thead>
<tr>
<th></th>
<th>SIS</th>
<th>Imaging</th>
<th>Case Tracking</th>
<th>Data Analytics</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Improve <strong>customer service, performance management, reporting, and metrics</strong></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
## Phase 2 Projects Timeline

<table>
<thead>
<tr>
<th>CY 2017</th>
<th>CY 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct</td>
<td>Jan</td>
</tr>
<tr>
<td>HR/Payroll BPR Assessment</td>
<td>HR/Payroll BPR Implementation</td>
</tr>
<tr>
<td>SEII BPR Implementation</td>
<td>SEII Ongoing Assessment &amp; BPR Implementation</td>
</tr>
<tr>
<td>RAPSS Submissions Implementation</td>
<td>eIRB, Animal Operations, &amp; eIACUC Implementation</td>
</tr>
<tr>
<td>Financial Consolidation and Close Cloud (FCCS)</td>
<td>Account Reconciliation Cloud (ARCS)</td>
</tr>
<tr>
<td>Fund Driver Module</td>
<td>Fixed Assets Planning &amp; Implementation</td>
</tr>
<tr>
<td>Hyberion Planning (Assessments, Enhancements and Training)</td>
<td>Profitability and Cost Management Cloud Service (PCMCS)</td>
</tr>
<tr>
<td>Scope review</td>
<td>Pre-execution planning and engagement</td>
</tr>
<tr>
<td>Timelines are proposed and subject to change.</td>
<td></td>
</tr>
</tbody>
</table>
Phase 2 Projects Timeline

### Procurement

- **Procure to Pay Policy Work**
- **PCard Implementation**
- **Travel Card Implementation**

### Reporting and Analytics

- **Scope review**
  - Digital Mailroom
  - Accounts Payable Automation
  - Pre-execution planning and engagement
  - BPR (Business Process Redesign)

### CRM

- **Assessment/Scoping**
  - Planning & Implementation

### Ongoing Cornerstone Stabilization and Optimization Programs

- **Grants and Contract Accounting (GCA) Project Review**
- **Cornerstone Reporting Optimization (CRO)**
- **Chart of Accounts Initiative (COA)**

Timelines are proposed and subject to change.
• Updated support and help desk contacts
  o cornerstone.rutgers.edu

• Stay connected
  o Finance and Cornerstone websites
  o Treasurer’s Town Hall
  o Cornerstone News Digest

• Send questions, suggestions and feedback to:
  o cornerstone@rutgers.edu
  o finance@rutgers.edu

• Grant Administrators
  o Join the RAIN listserv