Administrative Information Systems Transformation Overview
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 identity 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
Beginning October 2016…

<table>
<thead>
<tr>
<th>What Changed</th>
<th>What It Means for Staff and Faculty</th>
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</thead>
<tbody>
<tr>
<td>• Redesigned chart of accounts and accounting</td>
<td>• Streamlined financial management, grants management and reporting</td>
</tr>
<tr>
<td>environment</td>
<td>• Alignment with Responsibility Center Management budget model</td>
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<tr>
<td>• Single Human Resources and Payroll umbrella</td>
<td>• Brought together more than 10,000 employees from RBHS with the rest of</td>
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<tr>
<td></td>
<td>Rutgers for a more consistent employee experience</td>
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<tr>
<td>• Processes to</td>
<td>• More timely and efficient processing of transactions</td>
</tr>
<tr>
<td>o Purchase goods and services</td>
<td>• Lower risks</td>
</tr>
<tr>
<td>o Pay vendors</td>
<td>• Smarter spending</td>
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<tr>
<td>o Reimburse employees</td>
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</tbody>
</table>
Considerable organizational, process and technology changes

Enable efficiencies in research administration functions

Migration from Banner to PeopleSoft to Oracle

Cost management model

Responsibility Center Management budget

Single student information system

Redesigned chart of accounts and general ledger

Automated purchasing, accounts payable, expense management tools
NOTE: HFM (Hyperion Financial Management), HPCM (Hyperion Profitability and Cost Management), DRM (Data Relationship Management), Planning (Hyperion Planning)
Procurement Transaction Flow

**Transaction Types**
- Purchasing needs
- Payment requests from external systems, i.e., student and patient refunds
- Expense requests

**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

**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
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

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

<table>
<thead>
<tr>
<th>Course Type</th>
<th>Description</th>
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</thead>
</table>
| 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 |

Cornerstone
Transforming the Way We Work at Rutgers
### 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</td>
<td>• Hands-on exercises</td>
<td>• Support email / phone/live chat</td>
</tr>
<tr>
<td>• Communications</td>
<td>• Process dialogue</td>
<td>demonstrations</td>
<td>• Practice in</td>
<td></td>
</tr>
<tr>
<td>• Practice in development</td>
<td>• Process overview and</td>
<td>• Process flows</td>
<td>training environment</td>
<td></td>
</tr>
<tr>
<td>environment (sandbox)</td>
<td>context</td>
<td>How it fits into my</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Road shows</td>
<td>• Course slides</td>
<td>work</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Simulations</td>
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**Before Training**  
**During Training** (Instructor-led and Webinar)  
**On the Job** (Post-go live)
A comprehensive training solution includes…

**Key Elements to Training Strategy**

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

- **Audience**
  - Campuses
  - Roles
  - Access to Training
  - Availability

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

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

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

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

- **Tools**
  - Curricula
  - Courses
  - Modules
PHASE 1
<table>
<thead>
<tr>
<th>Key Activities</th>
<th>Completion Date</th>
</tr>
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<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></td>
<td>Mar. 2017</td>
</tr>
<tr>
<td>• Monthly close process initiated, and identified accounting and payroll posting issues addressed</td>
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</tr>
<tr>
<td>• Award end date corrections complete to offset system functionality</td>
<td></td>
</tr>
<tr>
<td>• Expense adjustments to correct conversion</td>
<td></td>
</tr>
<tr>
<td>• Cost transfer process for Sponsored projects (SWRJ and CISF forms)</td>
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SWRJ – Salary and Wage Redistribution and Justification
CISF – Change in Source Funds
PHASE 2
HR Business Process Redesign: Our Transformation Journey

2017

- **Stage 1**
  - **“Let Go”**
  - Recognize past successes, but prepare for the change

2018

- **Stage 2**
  - **Lead**
  - Socialize new model and structure to enable new behaviors to help employees embrace change

2019

- **Stage 3**
  - **Improve Processes**
  - Address issues, achieve operational excellence, and realize value

- **Stage 4**
  - **Adjust Organization**
  - Realign organization to become a best-in-class organization

- **Stage 5**
  - **Deploy Systems**
  - Implement systems (HCM Cloud, Taleo, etc.)
## HR BPR: High-Level Journey Timeline

*Please note that this is a high level journey timeline and dates are still being determined*

### Work Products

<table>
<thead>
<tr>
<th>August - October</th>
<th>November – June 2018</th>
<th>June and Beyond</th>
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<tbody>
<tr>
<td>►Service Delivery Model</td>
<td>►Change Management work products</td>
<td>►Communications</td>
</tr>
<tr>
<td>►Change Management Journey Map</td>
<td>►Pilot Strategy</td>
<td>►Metrics Dashboard</td>
</tr>
<tr>
<td>►Communication Plan</td>
<td>►Pilot Analysis</td>
<td>►New Technology</td>
</tr>
<tr>
<td>►Activity Analysis Readout</td>
<td>►Enhanced/Updated Model</td>
<td></td>
</tr>
<tr>
<td>►Change Network Mobilized</td>
<td>►Communications</td>
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### Key Activities

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<th>August - October</th>
<th>November – June 2018</th>
<th>June and Beyond</th>
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<tr>
<td>►Conduct Activity Analysis and provide readout</td>
<td>►Change Network Selection and Mobilization</td>
<td>►Measure Effectiveness</td>
</tr>
<tr>
<td>►Key Stakeholders will attend review sessions to buy in on future state design</td>
<td>►Pilot Analysis</td>
<td>►Implementation of the HCM Cloud</td>
</tr>
<tr>
<td>►Stakeholder Engagement Activities</td>
<td>►Service Delivery Model Rollout Approach</td>
<td></td>
</tr>
<tr>
<td>►Organizational Adjustment</td>
<td>►Change Management: Communicate and Educate organization</td>
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**Finalize Model**

**Approve Model**

**Mobilize Change Network**

**Pilot Execution/Review**

**Make Adjustments**

**Socialize Model**

**Adjust Org**

**Evaluation and Reporting**

**Employ Technology**
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
The Student Experience: One Stop Service Center

**Students…**

- Recruitment
- Graduation

**…interact through…**

- Web
- E-mail
- Phone
- In-Person

**…supported by…**

- Generalists
- Specialists

**…to process transactions across…**

- Financial Aid
- Student Accounts
- Admissions
- Registrar

**…using integrated technology systems**

- SIS
- Imaging
- Case Tracking
- Data Analytics

- **Seamless, consistent experience**
- **Access to common services, driving student-first philosophy**
- **Cross-trained generalists** (single point of contact for triage, support); and **specialists** (complex inquiries)
- **Streamline and manage high volume transactions**
- **Improve customer service, performance management, reporting, and metrics**
Timelines below are under review. Assessment and scoping will occur in November/December 2017. Final schedule TBD.
• 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