Administrative Information Systems
Transformation Overview

Cornerstone
Transforming the Way We Work at Rutgers

Last updated: November 14, 2017
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
### What Changed

<table>
<thead>
<tr>
<th>What Changed</th>
<th>What It Means for Staff and Faculty</th>
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<tbody>
<tr>
<td>• Redesigned chart of accounts and accounting</td>
<td>• Streamlined financial management, grants management and reporting</td>
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<tr>
<td>environment</td>
<td>• Alignment with Responsibility Center Management budget model</td>
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<td>• Single Human Resources and Payroll umbrella</td>
<td>• Brought together more than 10,000 employees from RBHS with the rest of Rutgers for a more</td>
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<td>consistent employee experience</td>
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<tr>
<td>• Processes to</td>
<td>• More timely and efficient processing of transactions</td>
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<tr>
<td>o Purchase goods and services</td>
<td>• Lower risks</td>
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<tr>
<td>o Pay vendors</td>
<td>• Smarter spending</td>
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<td>o Reimburse employees</td>
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</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
- Redesigned chart of accounts and general ledger
- Automated purchasing, accounts payable, expense management tools
- Single student information system
- Student Experience Improvement Initiative
- Financial Management
- Procurement
- Rutgers
- Rutgers Research Administration
- Budget Planning and Forecasting
- Human Resources/Payroll
NOTE: HFM (Hyperion Financial Management), HPCM (Hyperion Profitability and Cost Management), DRM (Data Relationship Management), Planning (Hyperion Planning)
**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

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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>
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</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>
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<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>
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<td>• Road shows</td>
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<td>• Simulations</td>
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Before Training | (Instructor-led and Webinar) | On the Job | (Post-go live) |
A comprehensive training solution includes…
PHASE 1
## Completed Phase 1 Activities

<table>
<thead>
<tr>
<th>Key Activities</th>
<th>Completion Date</th>
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<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>
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<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>
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<td><strong>Expense Management:</strong> Replaced lengthy, complex, paper-based process with streamlined online system</td>
<td>Jan. 2017</td>
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<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>
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<tr>
<td><strong>Financial Management:</strong></td>
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<tr>
<td>• Monthly close process initiated, and identified accounting and payroll posting issues addressed</td>
<td>Mar. 2017</td>
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<tr>
<td><strong>Grant and Contract Accounting:</strong></td>
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<tr>
<td>• Award end date corrections complete to offset system functionality</td>
<td>May 2017</td>
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<tr>
<td>• Expense adjustments to correct conversion</td>
<td>Jun. 2017</td>
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<tr>
<td>• Cost transfer process for Sponsored projects (SWRJ and CISF forms)</td>
<td>Aug. 2017</td>
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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.)
## HR BPR: High-Level Journey Timeline

<table>
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<tr>
<th>August - October</th>
<th>November – June 2018</th>
<th>June and Beyond</th>
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<tbody>
<tr>
<td><strong>Work Products</strong></td>
<td><strong>Key Activities</strong></td>
<td></td>
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</table>
| ► Service Delivery Model  
  ► Change Management Journey Map  
  ► Communication Plan  
  ► Activity Analysis Readout | ► Conduct Activity Analysis and provide readout  
  ► Key Stakeholders will attend review sessions to buy in on future state design  
  ► Change Network Selection and Mobilization  
  ► Pilot Analysis | |
| ► Change Management work products  
  ► Change Network Mobilized | ► Change Network  
  ► Change Management work products  
  ► Change Network Mobilization  
  ► Pilot Analysis | ► Stakeholder Engagement Activities  
  ► Organizational Adjustment | |
| ► Pilot Strategy  
  ► Pilot Analysis  
  ► Enhanced/Updated Model | ► Service Delivery Model Rollout Approach  
  ► Change Management: Communicate and Educate organization | ► Measure Effectiveness  
  ► Implementation of the HCM Cloud | |

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

Draft – Pending Review
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
### Cornerstone: Phase 2 Projects Timeline

<table>
<thead>
<tr>
<th>Research Administration</th>
<th>CY 2017</th>
<th>CY 2018</th>
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<tbody>
<tr>
<td></td>
<td>Oct</td>
<td>Nov</td>
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<tr>
<td>HR/Payroll BPR Assessment</td>
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<tr>
<td>HCM Cloud Partner Selection, Planning &amp; Implementation</td>
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<tr>
<td>SEII BPR Implementation</td>
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<tr>
<td>SEII Ongoing Assessment &amp; Implementation (TBD)</td>
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<tr>
<td>Timelines below are under review. Assessment and scoping will occur in November/December 2017. Final schedule TBD.</td>
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</table>
• 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