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

- Enable efficiencies in research administration functions
- Migration from Banner to PeopleSoft to Oracle
- Single student information system
- Redesigned chart of accounts and general ledger
- Cost management model
- Responsibility Center Management budget
- Automated purchasing, accounts payable, expense management tools

Business Process Reviews and Aligned Systems Upgrades
NOTE: HFM (Hyperion Financial Management), HPCM (Hyperion Profitability and Cost Management), DRM (Data Relationship Management), Planning (Hyperion Planning)
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

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

PeopleSoft HR/Payroll
- Employees
Financial Management Transaction Flow

Transaction Types
- Time & Labor

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

Oracle Cloud
- Journal Entries
- Cloud Subledgers
- Source Systems
- Manual Project Detail
- Payroll Detail
- Reporting

RU Marketplace
- Procurement Data

RAAPPS
- Pre-awards

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

Internal Source Systems
- Journal Entries
- Project Detail

Grants

Transaction Types

Draft – Pending Review
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

<table>
<thead>
<tr>
<th>System Integration Testing (SIT Cycle 1)</th>
<th>System Integration Testing (SIT Cycle 2)</th>
<th>User Acceptance Testing (UAT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirms that business processes work as designed across an integrated set of modules and integration partner applications</td>
<td>Involves a second execution of the integration test plan with a second run of conversions and additional configurations identified during SIT1</td>
<td>Business scenarios confirm that individuals can perform their jobs and provides a “day-in-a-life” experience to the user before production go-live.</td>
</tr>
</tbody>
</table>

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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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</tr>
</tbody>
</table>
A comprehensive training solution includes…

Key Elements to Training Strategy

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

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

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

- **Tools**
  - Curricula
  - Courses
  - Modules

- **Delivery**
  - Process Documentation
  - Attendance Tracking

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

- **Content**
  - Curricula
  - Courses
  - Modules
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></td>
<td>Mar. 2017</td>
</tr>
<tr>
<td>• Monthly close process initiated, and identified accounting and payroll posting issues addressed</td>
<td></td>
</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>
<td></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
*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 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…**

<table>
<thead>
<tr>
<th>Student Lifecycle</th>
<th>Students…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruitment</td>
<td>Recruitment</td>
</tr>
<tr>
<td>Graduation</td>
<td>Graduation</td>
</tr>
</tbody>
</table>

**…interact through…**

| Access to common services, driving student-first philosophy |
| Web | E-mail | Phone | In-Person |

**…supported by…**

| Cross-trained generalists (single point of contact for triage, support); and specialists (complex inquiries) |
| Generalists | Specialists |

**…to process transactions across…**

| Streamline and manage high volume transactions |
| Financial Aid | Student Accounts | Admissions | Registrar |

**…using integrated technology systems**

| Improve customer service, performance management, reporting, and metrics |
| SIS | Imaging | Case Tracking | Data Analytics |

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*Cornerstone*  
*Transforming the Way We Work at Rutgers*
<table>
<thead>
<tr>
<th>Project</th>
<th>Scope</th>
</tr>
</thead>
</table>
| **Human Resources / Payroll** (2/17 – 6/19)       | • Business process redesign and implementation  
• Cloud-based HR/Payroll system implementation initiated                                                                                     |
| **Reporting and Analytics** (4/17 – 12/18)        | Real-time, interactive, and actionable university-wide and divisional analytics capabilities; includes operational efficiency dashboards and predictive analyses |
| **Student Experience Improvement Initiative** (7/16 – 8/18) | Business process redesign for student services including one-stop shop, Customer Relationship Management, and selection of a student information system |
| **Research Administration** (6/16 – 3/18)         | Completion of e-compliance modules and Research Administration & Proposal Submission Integration with Oracle; implementation of business process improvements for animal operations |
| **Financial Management** (5/17 – 6/18)            | Oracle software upgrade, Fixed Assets implementation, Treasury integration                                                                 |
| **Budget and Planning** (6/17 – 9/18)             | Extend financial planning for multi-faceted modeling, including capital planning tied in with balance sheet models; transition to Cloud-based versions of software |
| **Procurement Services** (7/16 – 12/18)           | Strategic sourcing for spend categories; expense and travel management program                                                                 |
• 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