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
Transforming Our Administrative Information Systems

• Foundational element of the University’s strategic plan that will dramatically change 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
**Fundamentally Changing How We Conduct Business**

Beginning October 2016…

<table>
<thead>
<tr>
<th>What Will Be New</th>
<th>What It Means for You</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 implemented in July 2015</td>
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<td>• Single Human Resources and Payroll umbrella</td>
<td>• Bringing together more than 10,000 employees from RBHS with the rest of Rutgers for a more consistent employee experience</td>
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<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>
</tr>
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<td>o Reimburse employees</td>
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</table>
Business Process Reviews & Aligned Systems Upgrades
Considerable organizational, process and technology changes

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

Rutgers
Administrative Information Systems
Financial Environment

Procurement (SciQuest)
- Accounts Payable Director
- Supplier Manager
- Req/Ord Manager
- Sourcing Director
- Contract Compliance

Budgeting (Hyperion)
- HFM
- HPCM
- DRM
- Planning

Human Resources and Payroll
- PeopleSoft

Oracle Cloud Financials
- Procurement
- Cash Management
- Accounts Payable
- Projects & Grants
- Expense
- Accounts Receivable

Oracle General Ledger

Data Warehouse
- Financial Data Warehouse (Reporting)

NOTE: HFM (Hyperion Financial Management), HPCM (Hyperion Profitability and Cost Management), DRM (Data Relationship Management), Planning (Hyperion Planning)

Cornerstone
Transforming the Way We Work at Rutgers
Procurement: Transaction Flow

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

**SciQuest**
- Requisitions
- Purchase Orders
- Receipts
- Invoices
- Suppliers

**Oracle Cloud Fusion**
- Procurement
  - SciQuest 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 and Payroll**
- Employees

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Cornerstone
Transforming the Way We Work at Rutgers
Financial Management: Transaction Flow

Transaction Types
- Time & Labor
- Internal Source Systems
- Journal Entries
- Project Detail
- Grants

PeopleSoft HR and Payroll
- Employees
- Commitment Acctg/Payroll
- Time & Labor
- Benefits

SciQuest
- Procurement Data

RAPPS
- Pre-awards

Oracle Cloud Fusion
- Journal Entries
- Cloud Subledgers
- Source Systems
- Manual Project Detail
- Bank Statements
- Grants

Data Warehouse
- General Ledger Balances
- Project Detail
- Payroll Detail
- Reporting
Human Resources and Payroll: Transaction Flow

Transaction Types
- Time & Labor
- HR Transaction

PeopleSoft HR and Payroll
- Employees
- Commitment Acctg/Payroll
- Time & Labor
- Benefits

Oracle Cloud Fusion
- Payroll Journal Entries
- Payroll Project Detail

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

Payroll Detail
Budget Planning and Forecasting: Transaction Flow

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.

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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.
Training Approach

Central Training
- Financial Management
- Procurement
- Human Resources and Payroll

Universitywide Training
- Oracle Financial Management
- SciQuest
- PeopleSoft

Processes + Transactions + Reporting

Post-Training Support: Office Hours, Job Aids, Help Desk
### Training Delivery
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>• Testing experience</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>• Roadshows</td>
<td>• Process overview and context</td>
<td>• Live system (training environment)</td>
<td>• Practice in training environment</td>
<td>• Simulations</td>
</tr>
<tr>
<td>• Communications</td>
<td>• Course slides</td>
<td>• Process flows</td>
<td>• Exercise data sheet</td>
<td>• Post Go-Live Support</td>
</tr>
<tr>
<td></td>
<td>• Live system (training environment)</td>
<td>• How it fits into my work</td>
<td></td>
<td>• Training sandbox and exercises</td>
</tr>
</tbody>
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<tr>
<th>April/May</th>
<th>June/September</th>
<th>September/Ongoing</th>
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**On the Job**
Cornerstone
Transforming the Way We Work at Rutgers
Change Management: Key Elements to Training Strategy

A comprehensive training solution includes the following key elements:

- **Process**
  - Documentation

- **Attendance**
  - Tracking

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

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

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

- **Curricula**
  - Courses
  - Modules

- **Process Documentation**
  - Attendance Tracking

- **Instructors**
  - Led Training
  - Hands-on activities

- **E-learning**
  - Training Tools
  - Super Users
  - Virtual Help Desk
  - Chat Room

- **Logistics**
  - Delivery

- **Audience**
  - Support

- **Tools**
  - Content

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

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

- **Content**
  - Chat Room
  - Virtual Help Desk
  - Super Users
How You Can Be a Part of the Process

• Visit the Cornerstone website

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

• Contact a Business Advisory or School Unit Representative member
  
  Visit the Cornerstone website for and contacts

• Attend road shows and information sessions to learn more

cornerstone.rutgers.edu