



# The College Of New Jersey Oracle Cloud Implementation

## Oracle Cloud Project Town Hall

March 12, 2019  
11:00-12:00



# Agenda

Who's who?

How did we get here?

Where are we going?

What are we implementing?

What is going to change?

Where can I learn more?

Q & A

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**Who's who?**

# Executive Sponsors

**Lloyd Ricketts**

Vice President and Treasurer



**Sharon Blanton**

Vice President for Information  
Technology & CIO



**Gregory Pogue**

Vice President for Human  
Resources



# Project Management - TCNJ

**Kimberly Woods**

HR Project Management

**Allison Lengyen**

IT Project Management

**Larissa Chomyts**

Finance Project Management

**Jen LaMarsh**

Finance Project Management



# Our Partners - Huron

**Ted Simpson**

Managing Director

**Susan Garland**

Senior Director

**Newton Adkins**

Project Manager, HCM Lead,  
Recruiting & Onboarding Lead

**Lura Jenkins**

Absence and Benefits Lead

**Matthew Bonnett**

ERP Lead, Project Portfolio  
Management Lead



**Kamryn Klawitter**

Payroll Lead

**Danny Wynn**

Technical Lead

**Rebecca Overton**

Procure to Pay Lead

**Tom Feustel**

Core Financials Lead

**Matthew Shanley**

Change Management SME &  
Performance Lead

**TCNJ** THE COLLEGE OF  
NEW JERSEY

# Our Partners - Oracle

**Jay Carpenter**

Regional Manager

**Chris Wandling**

Higher Ed Sales Executive

**Som Huchappaswamy**

Implementation Support Manager

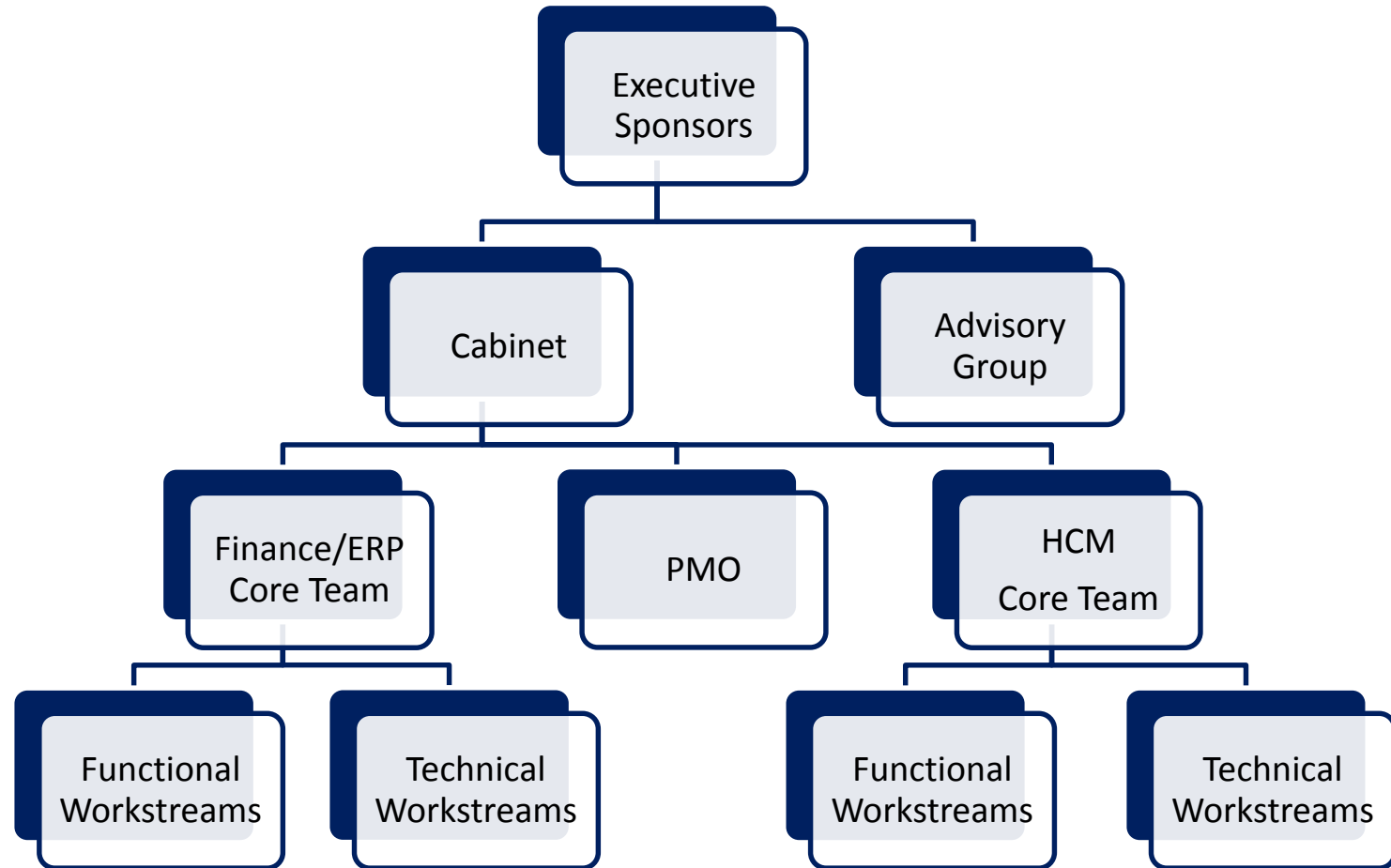
**Tim Ferguson**

Customer Support Manager

The Oracle logo, consisting of the word "ORACLE" in white, uppercase, sans-serif font, centered within a solid red rectangular background.

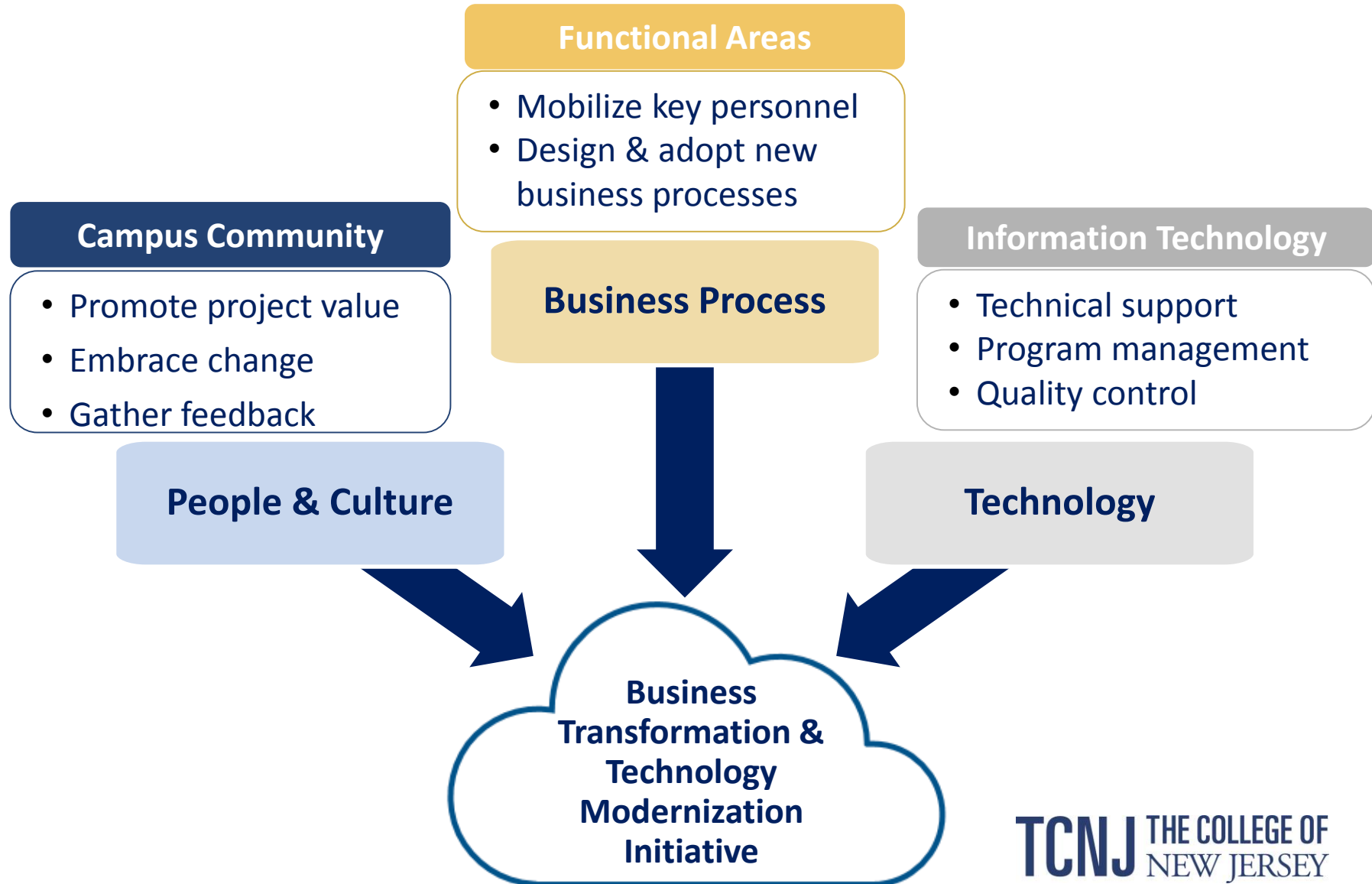
# Project Governance

## Cloud Implementation Governance Structure





# Our Project: College-Wide Participation



# Oracle Introduction Video



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**How did we get here?**

# Journey to the Cloud

The **Business Transformation and Technology Modernization Initiative** will improve the **Human Capital Management processes and the underlying technology** across all financial, administrative, and research functions at TCNJ.

This **initiative** is **consistent with the College's strategic priorities** to build, operate, and maintain a safe, sustainable, and accessible physical and technological infrastructure that supports high-caliber learning and a sustainable financial model.



# Journey to the Cloud: Past, Present, and Future

TCNJ has already begun and will continue the journey to improve administrative processes and the underlying technology by moving to the cloud.



- Email
- Filesharing
- Helpdesk
- Project management
- Research Administration
- Absence management
- Career services
- Police dispatch
- Employee recruitment
- College website
- Travel and expense

- Student housing
- Alumni and development
- Academic labs
- Student relationship management

- Finance
- Grants
- Human Capital Management
- Planning & Budgeting

# Current State Themes



## COMPLEXITY

- + Challenging to integrate with existing technologies
- + Numerous homegrown systems and bolt on shadow systems required to close functionality gaps
- + Difficulty in training users and application support staff on multiple platforms
- + System upgrades are lengthy and complex



## INEFFICIENCY

- + Processes and practices are inconsistent across business units
- + The need to reconcile data across systems cause delays in trend analysis and reporting
- + Manual procedures prevent timely completion administrative tasks
- + Very limited mobile capabilities



## RISK

- + Loss of institutional knowledge as staff retire, and difficulty recruiting new staff in legacy environment
- + Outdated and sometimes unsupported technologies

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**Where are we going?**

# Vision for the Future



## MODERNIZATION

- + “Future-proofing” – minimal integrations with a single administrative platform
- + Ability to leverage all enterprise resource planning (ERP) and human capital management (HCM) functionality to enhance self-service user experience for staff and faculty
- + Comprehensive view of data to access real-time information in a user-friendly, task oriented interface



## OPTIMIZATION

- + Increased efficiency and effectiveness – improved policies/procedures and less time on transactions
- + Migrating to the Cloud will allow us to decrease staff focus on backend technical issue and reallocate that time to more mission centric tasks
- + Real time information to support management and strategic decision making across TCNJ



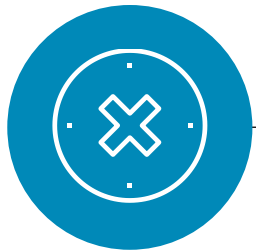
## SUSTAINABILITY

- + More intuitive system interfaces enable faster staff training – across end users and support staff
- + Reduced administrative burden allowing more balanced workloads for staff, and increasing capacity
- + Alignment of a modern ERP and HCM platform and workforce recruiting opportunities

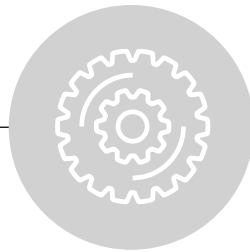


# What Will The Future Look Like?

## Modern Infrastructure supports TCNJ's Mission and Strategic Goals



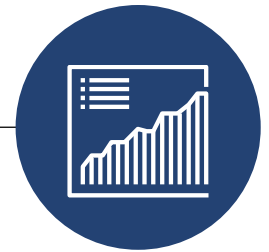
Eliminating manual  
process



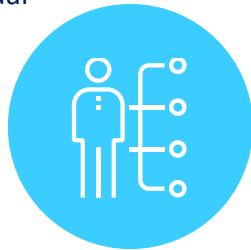
Single integrated  
platform



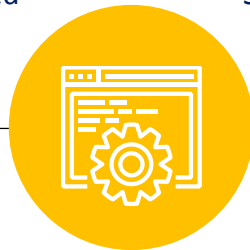
Simplified interface  
minimizes training  
needs



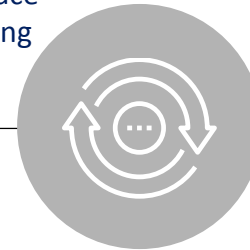
Real time data



Employees and students  
build marketable skills



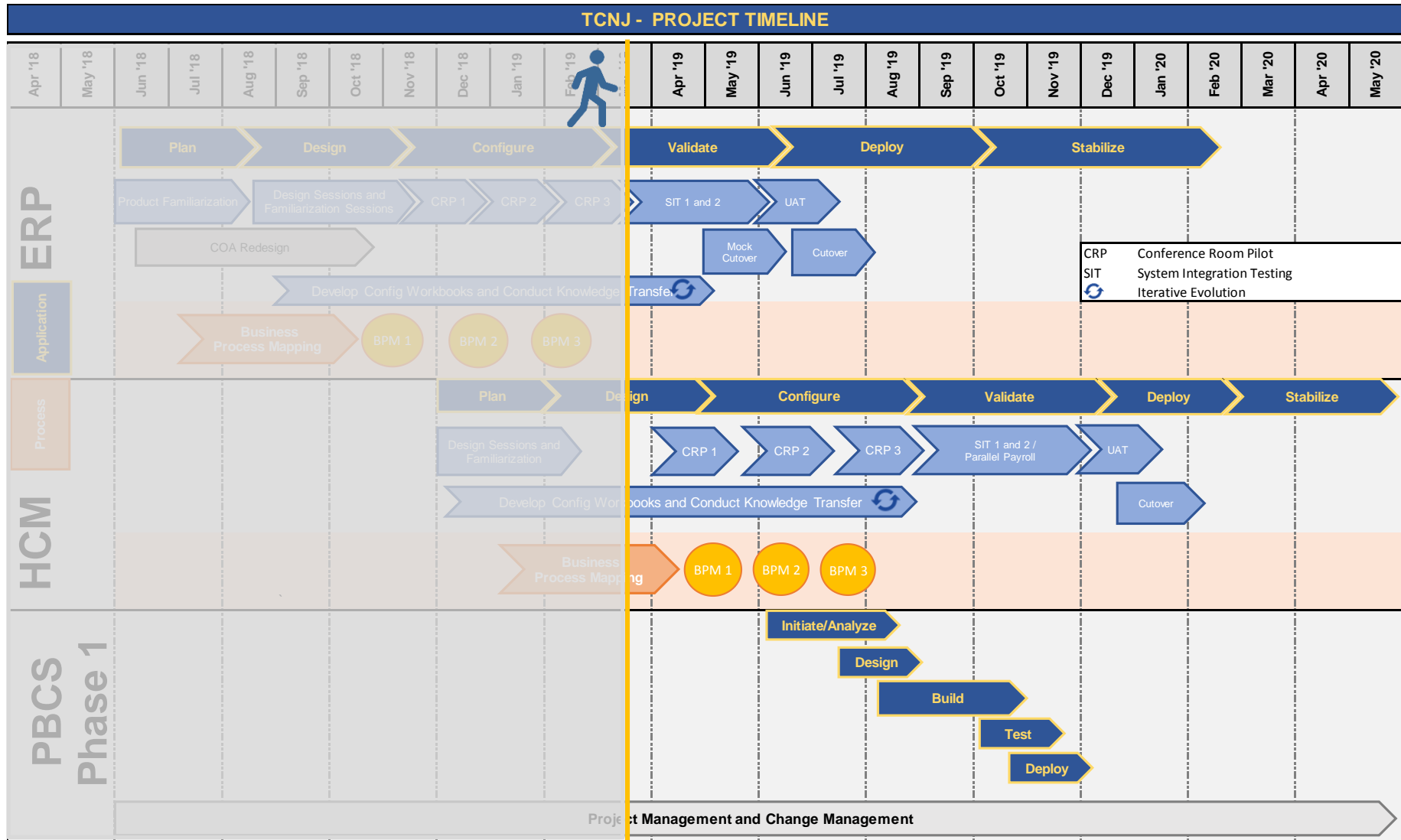
Stewardship of  
resources



Continuous quality  
improvement

# Tentative Project Timeline

Today



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**What are we  
implementing?**

# Human Capital Management

**Human Capital Management (HCM):** Hire and retain top faculty and staff. Recruit, grow, and retain your employees with talent acquisition, learning, and performance management.

**HCM Modules:** Absence, Benefits, Core HR, Performance, Payroll, Taleo Recruiting, Taleo Onboarding

# Enterprise Resource Planning

**Enterprise Resource Planning (ERP):** Empower modern finance to unite disparate accounting systems, improve project profitability, and streamline payment processes through automation and social collaboration, while controlling costs.

**Finance (ERP) Modules:** Accounts Payable, Accounts Receivable, Budgetary Control, Cash Management, Fixed Assets, General Ledger, Internal Billing, PPM (Capital Projects), PPM (Grants), Procurement

# Planning and Budgeting

**Planning and Budgeting:** Drive accurate and agile plans across finance and lines of business, analyze data across the institution, and improve data-driven decision-making.

**Scope/Modules:** Enterprise Planning and Budgeting Cloud Service (EPBCS)

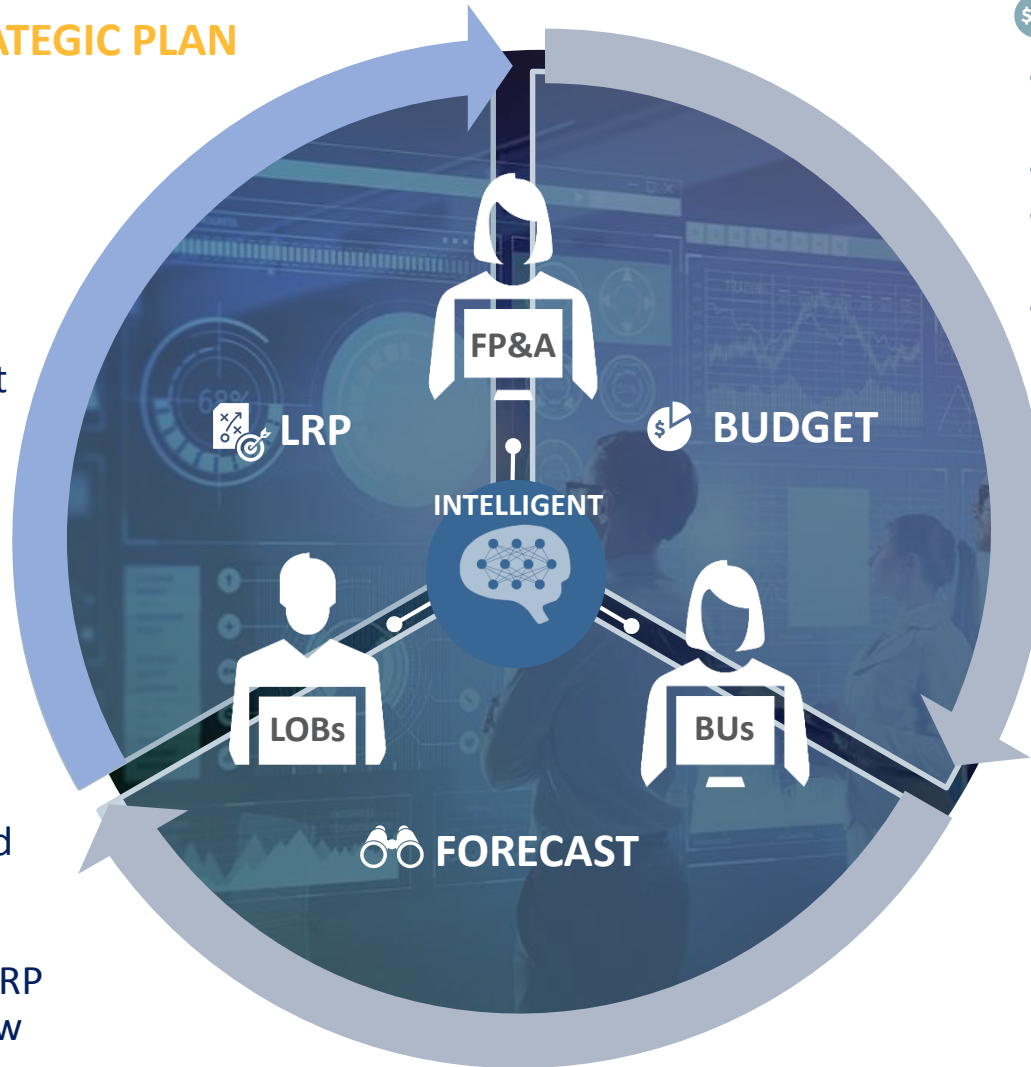
# Oracle Intelligent Connected Planning

## LONG-RANGE / STRATEGIC PLAN

- Top-down, driver-based
- Modeling for risks, Funding, and strategic initiatives
- Combine multiple scenarios
- Define targets for budget & forecast

## FORECAST

- Bottom-up, driver-based
- Rolling forecasts & predictive planning
- Forecast connected to LRP for iterating through new plan assumptions



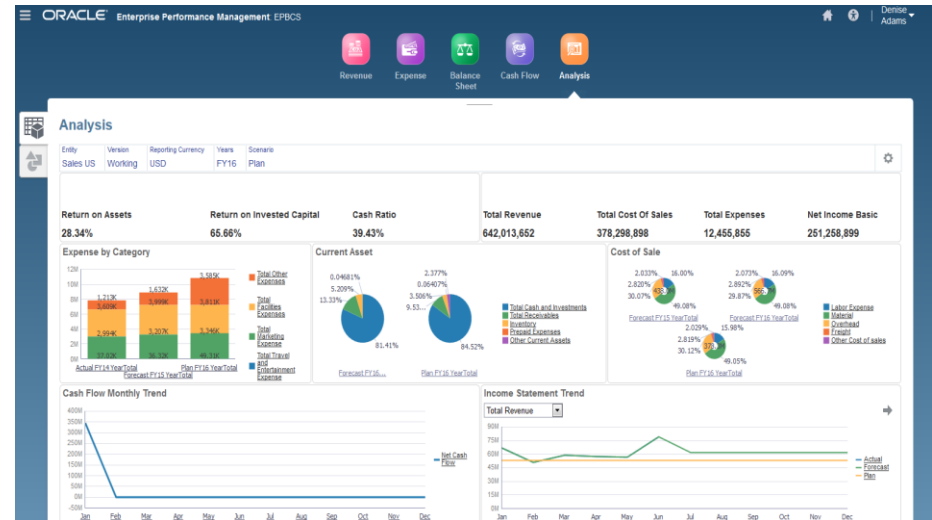
## BUDGET

- Bottom-up, driver-based
- Position Budgeting
- OpEx, Capital, Projects, etc.
- Management Allocations

# Best Practice Planning Out-of-the-Box

## Enterprise Planning Cloud

- Configurable, Integrated, Automatically upgraded
- Driver-based Planning (e.g. enrollment, credit hours, FTEs, square feet, etc.)
- Connect Financial & Operational Planning



STRATEGY



FINANCIALS



WORKFORCE



CAPITAL



PROJECTS



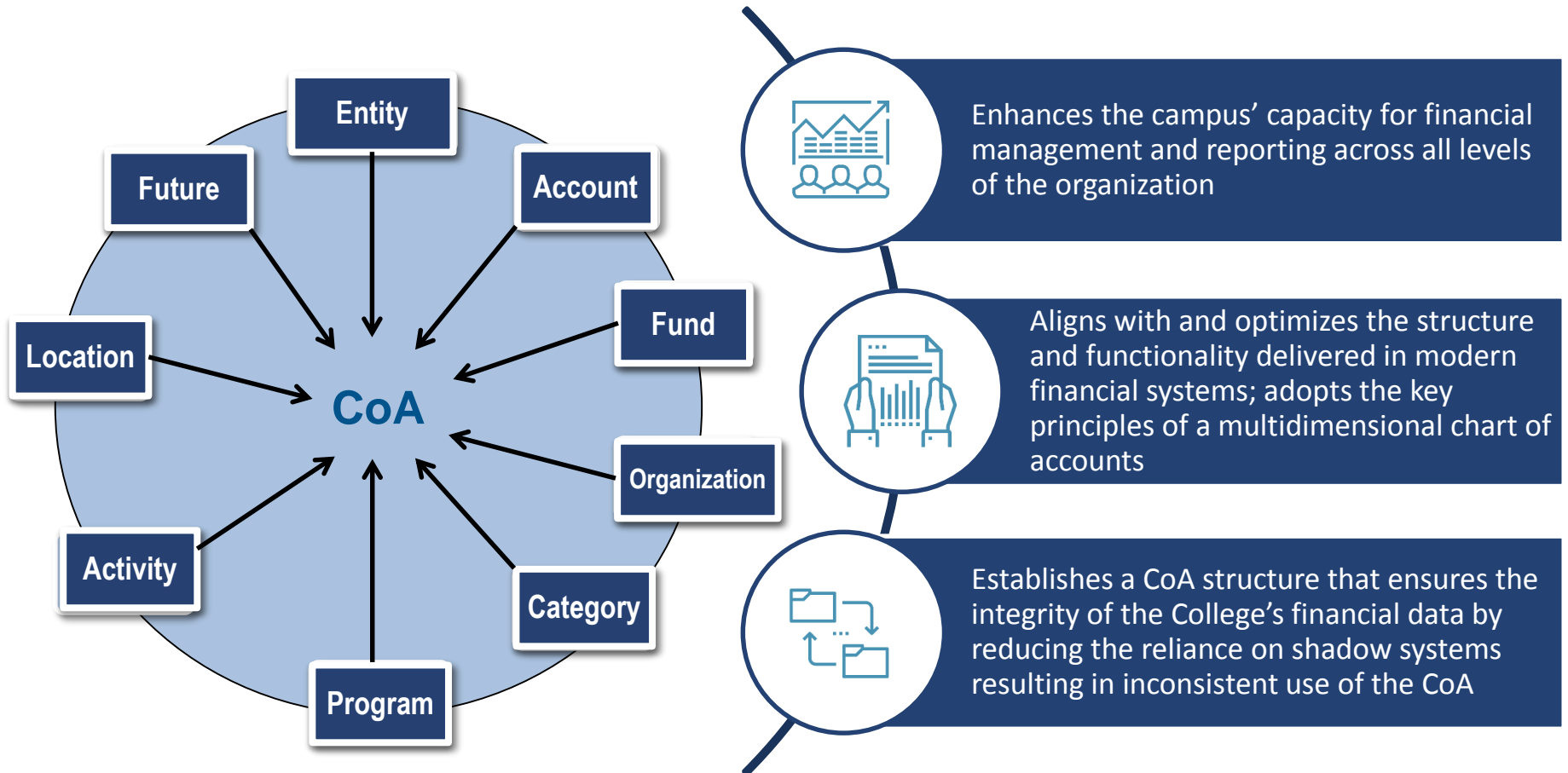
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**What is going to change?**

# User Friendly Interface: One-stop Shopping

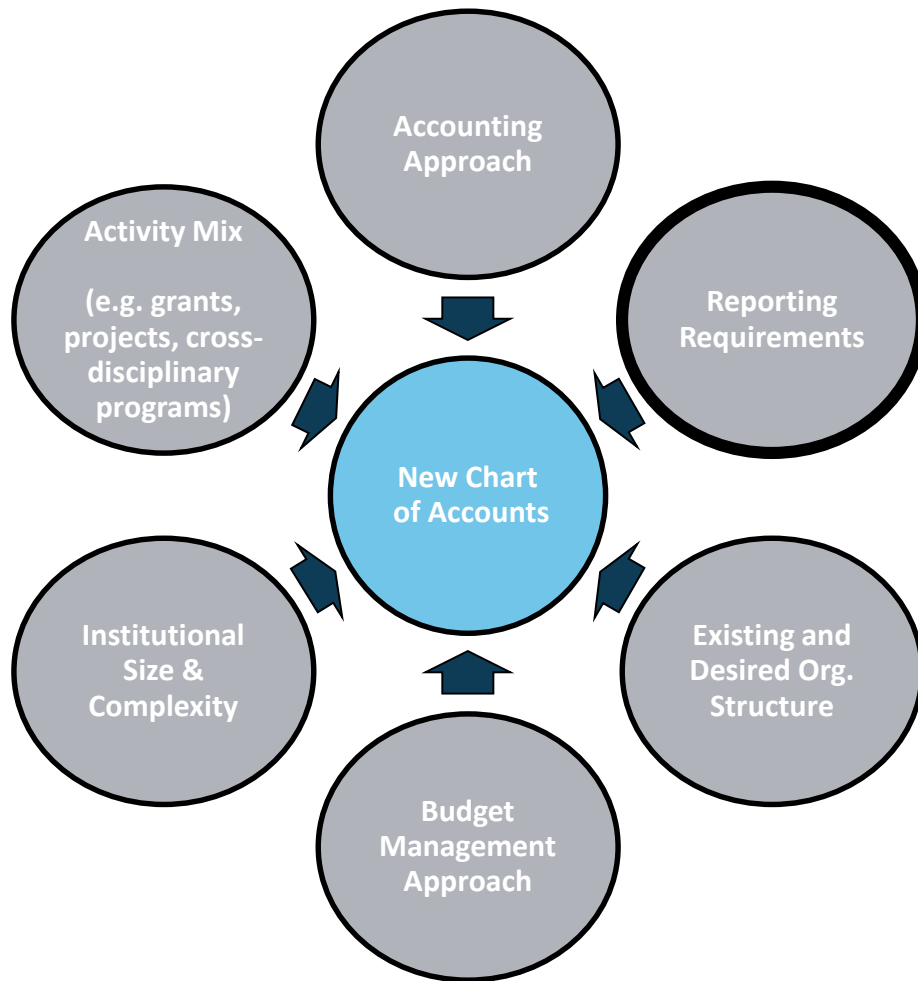


# Chart of Accounts (CoA) Redesign



# What's built into the Chart of Accounts?

Taking into account reporting requirements is critical to ensuring a successful chart of accounts structure is developed.



## Reporting Requirement

By ensuring comprehensive reporting requirements are gathered at the beginning of this process, TCNJ can better hope to :

- Ensure that “shadow systems” aren’t maintained across campus once the project is completed
- Ensure that how you generate “new data” supports the decisions that need to be made
- Take into account the needs of the entire college whether they directly access the ERP System or not

# What's built into the Chart of Accounts?

Furthermore, the CoA structure is informed by the institution's approach to Budget Management.



## Budget Management Approach

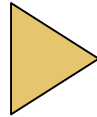
- Segments required to allocate and report on the budget in a meaningful way
- Additional Information needed to support sponsored programs, projects and commitment planning and budgeting
- Hierarchical structures needed to support the creation and tracking of budgets and financial plans
- Additional information needed to manage the financial plan at all levels and departments of the institution

# High Change Impact Business Processes in the Cloud

## Budgetary Control

### Current State

Budget management and monitoring require many reallocations due to its structure.



### Future State

Budgetary control structure is significantly improved and allows insight into balances while controlling spending at a rolled-up levels (division/schools).

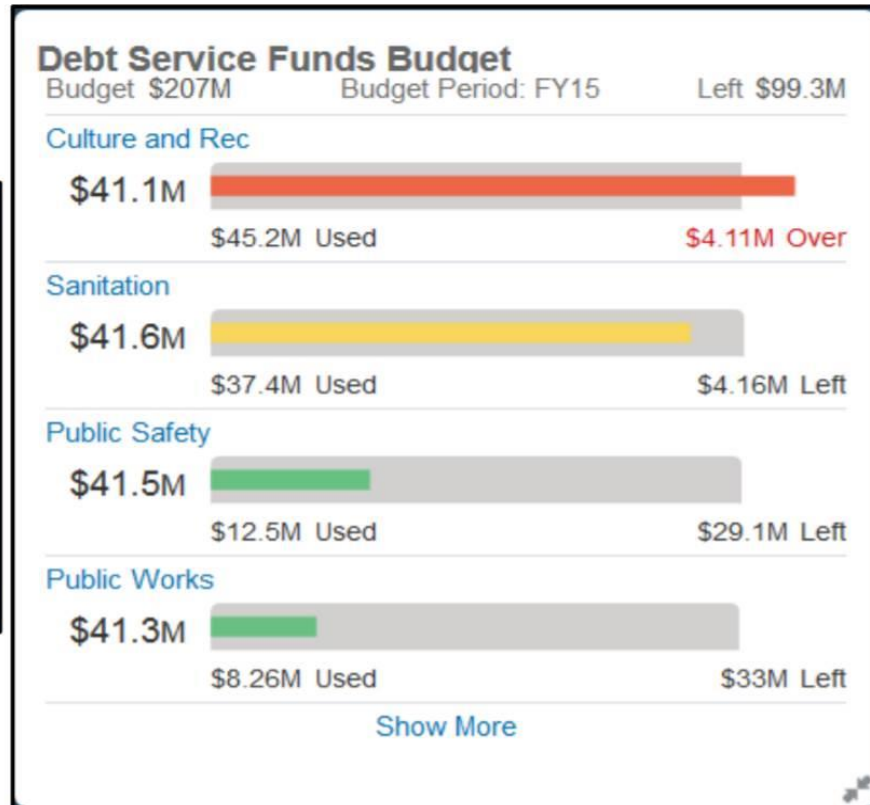
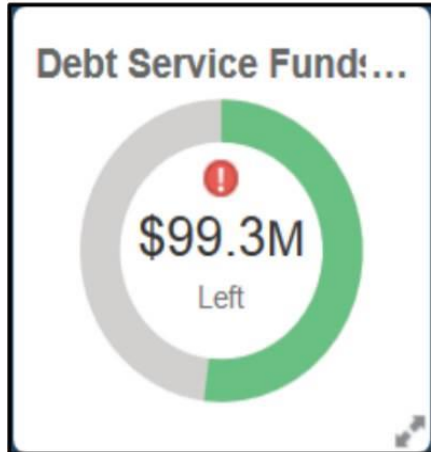


### Benefits

Fewer budget reallocations will be necessary while retaining appropriate levels of budgetary control. More accountability and at the department level.

# Budgetary Control

## Monitoring Key Accounts

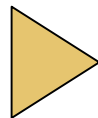


# High Change Impact Business Processes in the Cloud

## Grants Management

### Current State

Limited grant award information can be maintained in the PeopleSoft system.



### Future State

A significant amount of award information is maintained within the system, including the CFDA number, linkage of cost-sharing projects, reporting frequency and due dates, etc.

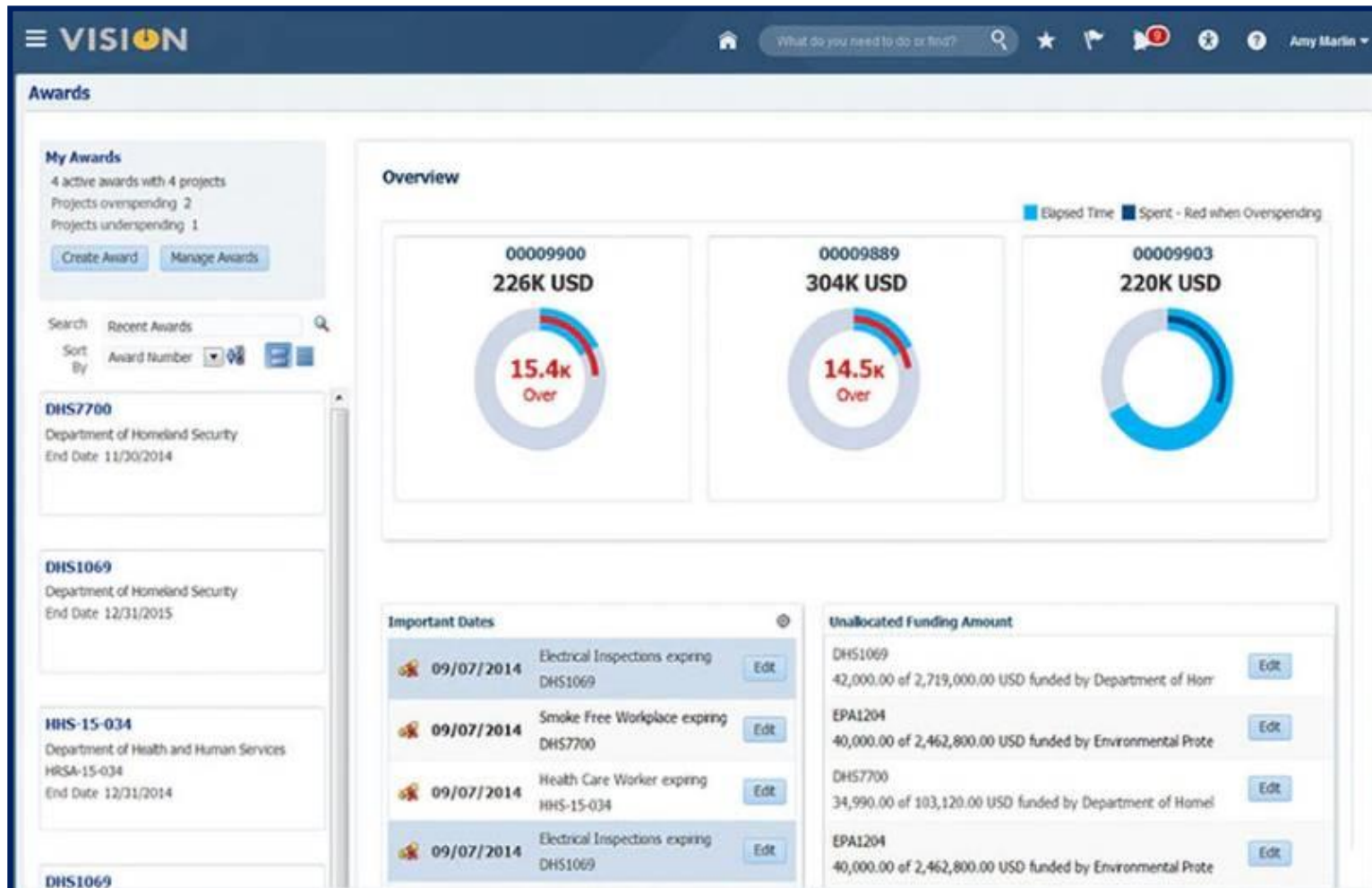


### Benefits

Improved compliance with external reporting requirements and increase efficiency and accuracy in the preparation of TCNJ's annual single audits.



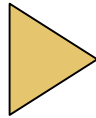
# Grants Management - Awards



# High Change Impact Business Processes in the Cloud Procurement

## Current State

Purchase orders are only required for items procured over a certain dollar threshold.



## Future State

Requisitions (which process into PO's) will be required for all transactions unless a P-card is used or transaction is a designated reimbursement.



## Benefits

- Budget is impacted immediately
- Standardized process for purchasing goods/services
- Leverage punch out capabilities for suppliers like Staples

# Procurement Example



Purchase Requisitions



Purchase Agreements



Purchase Orders



My Receipts



Negotiations



Catalogs



Suppliers

Create Request: Order by Quantity

Add to Shopping List

Add to Cart

Done



Request Type Order by Quantity ▼

Line Type Goods

\* Item Description Beds

\* Category Name Housekeeping Supplies

\* Quantity 10

\* UOM Name EA ▼

\* Price 1,000.00

Currency USD

\* Supplier XYZ Company

\* Supplier Site Winter Park,FL ▼

Agreement

Supplier Contact ▼

Phone

Fax

Email

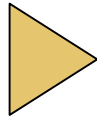
Supplier Item

# High Change Impact Business Processes in the Cloud

## Accounts Payable

### Current State

There is no current invoice imaging solution, at least to the extent of systematic invoice creation or visibility within the system.



### Future State

Invoices will be imaged systematically with some intervention by the AP staff and visible to departmental users (electronic filing system).



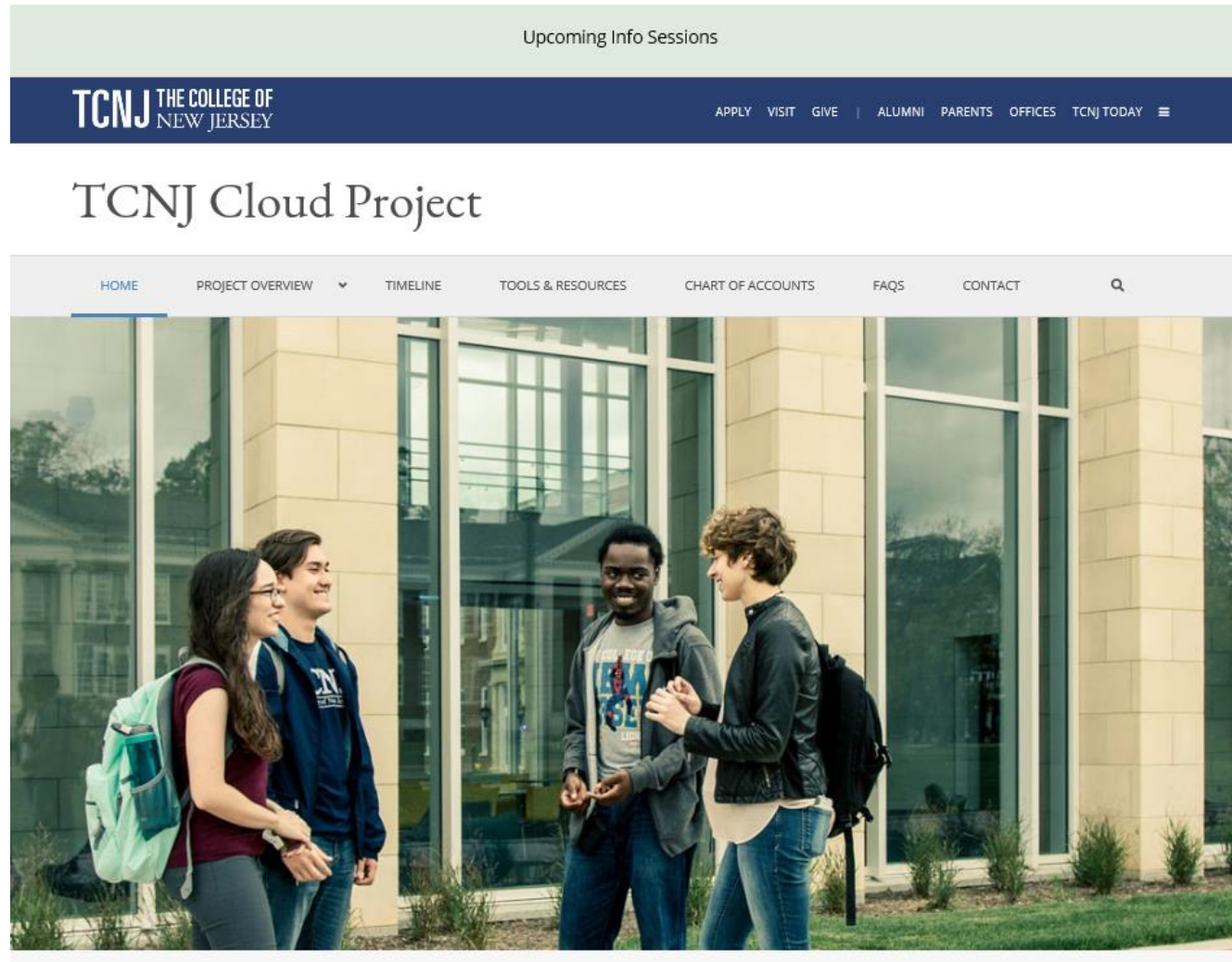
### Benefits

Vendor invoice will automatically attach to the payment eliminating filing or misfiling of documents.

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**Where can I learn more?**

# TCNJ Oracle Cloud Implementation Website



<https://cloudproject.tcnj.edu/>

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# Training Opportunities

- **Upcoming Town Halls including:**
  - System Demos
  - Chart of Accounts Overview
- **“Drop-in Sessions” with TCNJ module Leads**
- **End User Acceptance Testing (UAT)**
- **End User Training**
- **Look for more communications and information to come on the website!**



**Q & A**