

Enterprise Systems Upgrade Program: A platform for innovation

Presentation to the Board of Regents
June 14, 2013



What is ESUP?

- Enterprise Systems Upgrade Program
 - Multiple projects = one program
- Integrated Systems
 - Student
 - Human Resources (HRMS)
 - Finance
- Technologies to support the University of Minnesota's mission
 - Stewardship of investments
 - Proper management and oversight
 - Enterprise level planning and decision making



What we built



Industry standard

Why Upgrade Now?

- Compliance: regulatory and security support for HRMS and Student ended in December 2012 (extended to 2014)
- Our highly customized systems are costly to maintain
- In many cases, PeopleSoft delivered functionality is now on par with or superior to our customizations
- Upgrading enables us to take advantage of new technologies
- We need more consistent data to help us make better operational and management decisions



Program Goals

- Streamline and integrate business processes
- Reduce long-term system support costs
- Build foundation for access to operational and strategic data
- Reduce risk
- Forge business-led technological and cultural change
- Work together as one University



ESUP's Implementation Partner

- Selected well-known and experienced higher education implementation partner, CedarCrestone, Inc (CCI)
- Provides project management oversight and best practices
- Guides work streams through PROPEL methodology



Program Governance

Approved 4/26/2013

Executive Oversight Committee

Chair: Dean Robert Elde

*Members: Vice President Kathy Brown, Vice Provost and Dean Robert McMaster
Vice President Richard Pfitzenreuter, Vice President R. Scott Studham*

Integration Steering Committee

Chair: Andrea Backes (CBS)

*Members: Rob Super, Mike Volna, Dan Hemauer (EFS); Lori Lamb, Kelly Krattiger,
Kris Hause (HRMS); Sue Van Voorhis, Grant Clavelle, William Dana (Student);
Sharon Ramallo (IT); Andy Hill (Program Director)*

Program Director

Andy Hill

Finance Functional Steering Committee

*Chair: Rob Super;
Business Owner: Mike Volna;
Project Director: Dan Hemauer;
IT Tech Owner: Ruth Dodson
End Users*

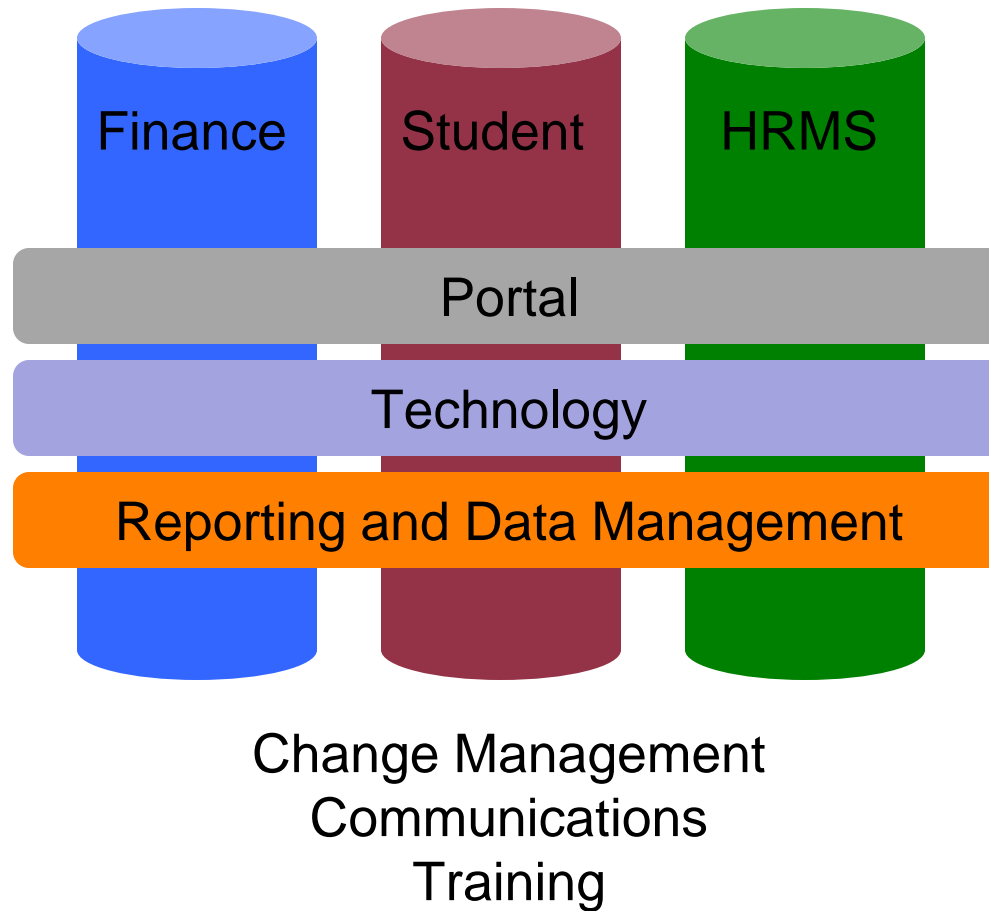
Student Functional Steering Committee

*Chair: Sue Van Voorhis;
Business Owner: Grant Clavelle;
Project Director: William Dana;
IT Tech Owner: David Imdieke
End Users*

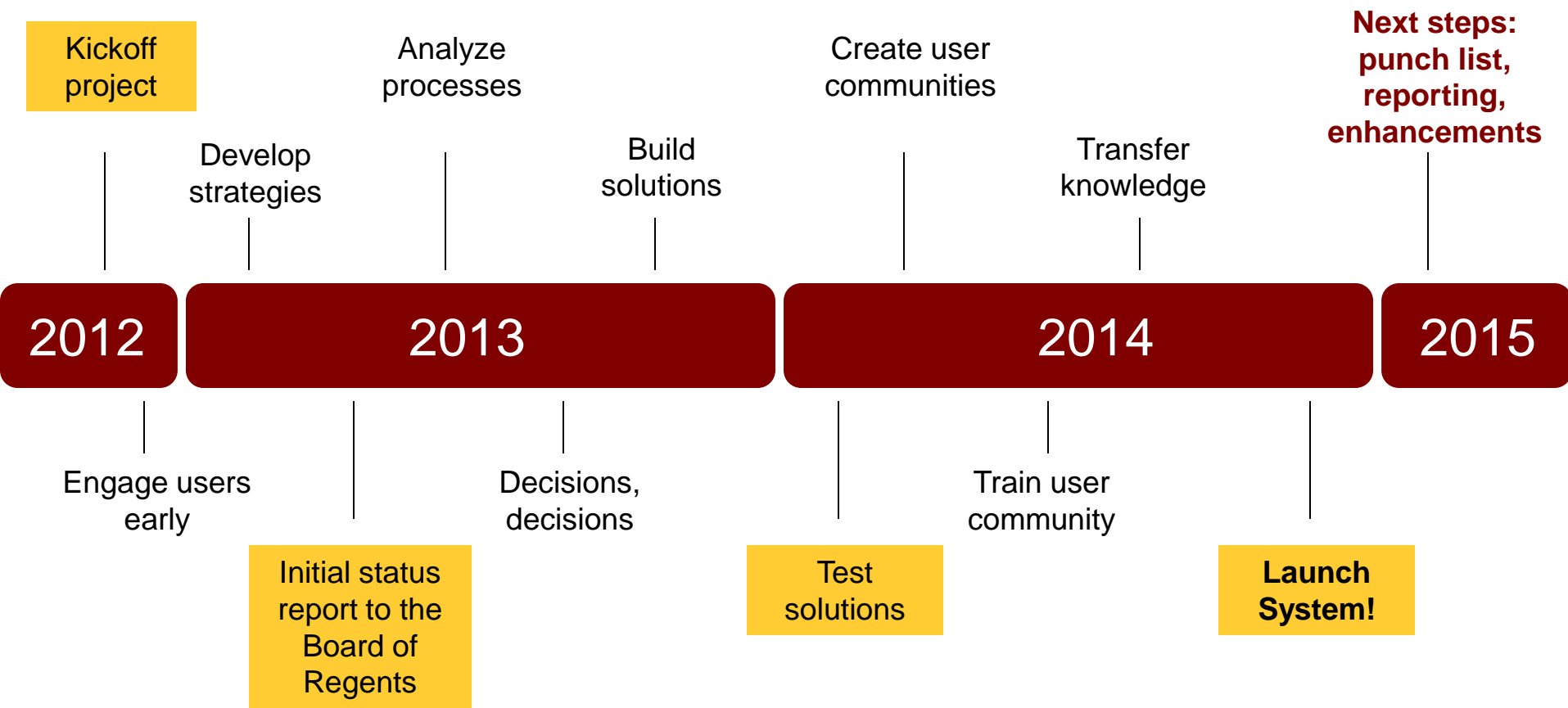
HRMS Functional Steering Committee

*Chair: Lori Lamb;
Business Owner: Kelly Krattiger;
Project Director: Kris Hause;
IT Tech Owner: Phyllis Mohrlant
End Users*

Multiple Work Streams



Timeline



By the numbers

STUDENT SYSTEM

\$1B



tracking and billing tuition and fees

\$490M



in federal financial aid processing

50M



student online interactions to find classes and pay fees

2M



class registration events

1M+



reports and audits to prepare students for graduation

114K



admissions applications

80K



official transcript requests

12K



degrees awarded



Student System Highlights

- Over 80 Plan & Discover sessions with 100+ participants from all system campuses
- Over 600 Analyze & Design Phase topics identified
 - 58% of topics are in-progress or complete
- High level of involvement from system campuses
 - Embedded in governance & team work
 - End users engaged widely in surveys & town hall meetings
- Stakeholders engaged
- Teams asking critical questions
 - Removing modifications
 - Improving & aligning processes across campuses

By the numbers

HUMAN RESOURCES MANAGEMENT SYSTEM (HRMS)

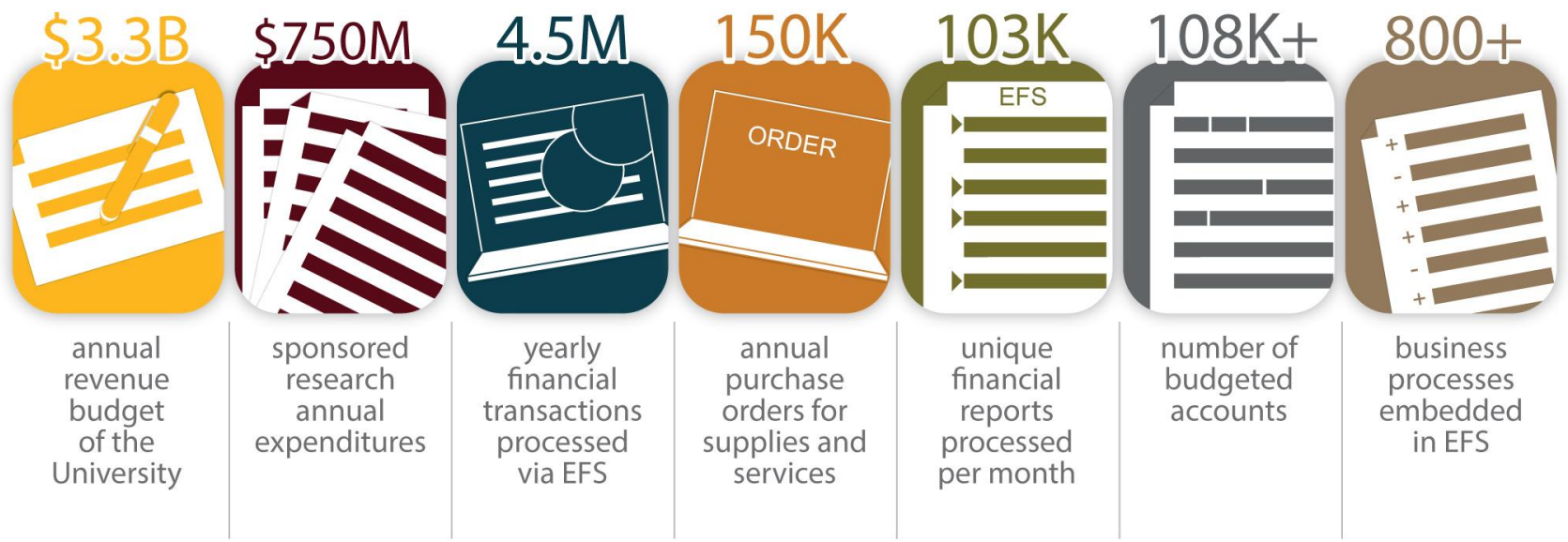


HRMS Project Highlights

- Completed 67 Plan & Discover sessions with 100+ participants system-wide
- Conducted OHR Portal retreat
- Added Recruiting Solutions, Time & Labor, and Absence Management to ESUP implementation *without increasing the budget or timeline*
- Began Joint Payroll Accounting sessions, collaborating with finance, HR, reporting, and central administrative offices
- Made foundational recommendations for Data Conversion and Appointment Data Reconfiguration strategies
- Formed OHR Portal Planning Committee to help plan and support the delivery of a high-functioning OHR portal as part of the ESUP Portal project

By the numbers

FINANCE PROJECT



Finance Project Highlights

- Pre-kickoff activities, Jan 2011-May 2013:
 - Preparation / update of all finance system and business process documentation
 - Prioritized recommendations from Oracle's 2011 fit-gap analysis
 - Initial review of new features in PeopleSoft version 9.2
 - Developed organizational structure and engagement model for the Finance Project
- Project kick-off held May 8, 2013
- Phase 1: Plan & Discover sessions scheduled from mid-May through August, 2013

Reporting and Data Management

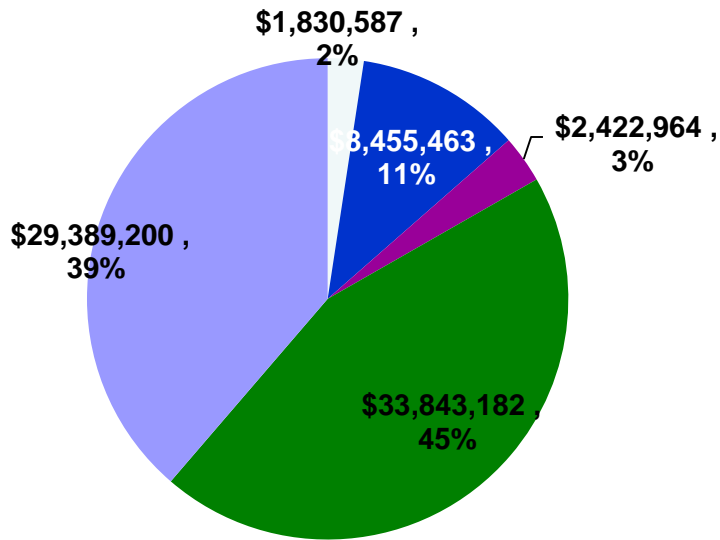
- Integrating with project work streams to meet go live reporting needs
- Increasing the ability to support enterprise-wide reporting using real time data
- Aligning with Enterprise Data and Reporting Management (EDMR) to develop stronger data governance policies and processes
- Supporting EDMR's initiative to provide a framework for analytical reporting

Change Management, Communications, & Training

- Leverage existing organizational structures: work both top down and bottom up
- Integrate business engagement into decision-making structure (Ex: One campus, one vote for Student)
- Use two-way, balanced communications so stakeholders feel a shared ownership in the change
- Develop in-line support and on-line or in-person training depending on business process complexity and user needs
- Grow role-based communities to share expertise

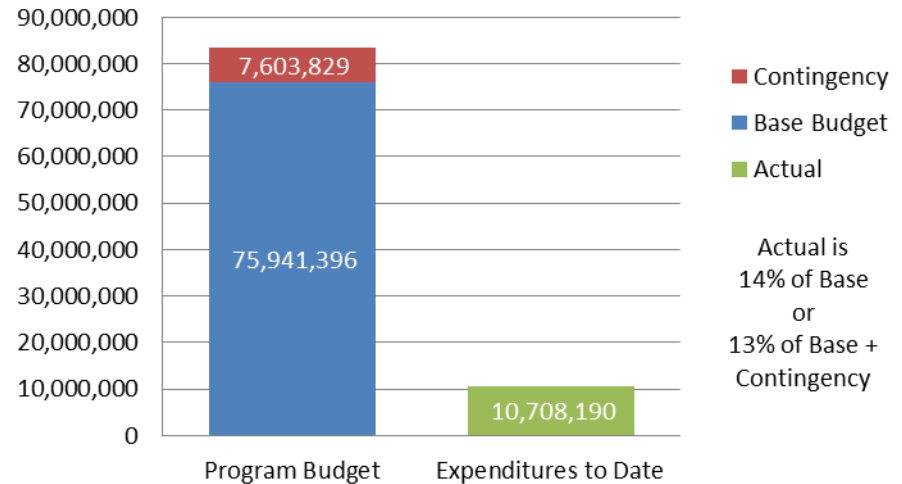
Project Budget and Progress

ESUP Overall Budget
(without contingency)



- Overhead Costs
- Hardware
- Cedar Crestone
- Software
- UMN Staffing / Backfill

ESUP - Budget and Actual to Date
As Of April 30, 2013



ESUP – Progress

As Of April 30, 2013

15% overall scope completion

Program Quality Review (PQR)

- Independent CCI quality manager conducts review to gauge Program health
- May, 2013 results ranked Program green in the three reviewed areas
 - Overall program status, program schedule, and quality / performance
- Identified areas of strength
 - Outstanding staff, remarkable executive support, and commitment to quality
- Next PQR scheduled for August, 2013

“The level of collaboration that exists is something that one often only reads about.” – attributed to CCI

Conclusion

- Ensure the timely adoption of an effective enterprise system by an engaged University community
- Active governance structure combined with experienced implementation partner
- Work streams are making great progress
- Program budget is carefully managed and reviewed
- Latest program review graded ESUP as “healthy”

Thank You

