

TECHNOLOGY SOLUTIONS CASE STUDY



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Upgrading to Oracle Cloud: Rutgers University Finds Scalability and Efficiency for a New Multi-Campus Environment

RUTGERS UNIVERSITY

Founded in 1766, Rutgers, The State University of New Jersey, also known as Rutgers University, is an American public research university with primary locations in New Brunswick, Camden, and Newark and additional activities conducted throughout the state. Offering undergraduate, graduate, and continuing education programs, Rutgers serves more than 71,000 students and is known for its leading programs in academic and clinical health sciences. Rutgers provides diverse educational and research opportunities through over 150 undergraduate and over 400 graduate degree programs. With 300 research centers and institutes, Rutgers hosts the largest network of research institutions in New Jersey.

INITIAL CHALLENGES

During summer 2013, Rutgers University legally merged with all but one of the schools and clinical units of the University of Medicine and Dentistry of New Jersey (UMDNJ), while maintaining the partnership with University Hospital in Newark as the teaching hospital for the New Jersey Medical School. As with most mergers, the amalgamation of entities led to the complex process of melding the separate offices, policies, procedures, administrative practices, and disparate software systems used at each institution. In September 2013, Executive Vice President for Finance and Administration and University Treasurer Mike Gower launched an initiative to analyze the two technological environments in place and narrow down to a set of common requirements for a new suite of systems that would unite the newly-combined institution and scale across Rutgers's large multi-campus environment.

At the time, Rutgers University used Oracle E-Business Suite for financial management, Oracle PeopleSoft for human resources, and a home grown student information system, while UMDNJ used Ellucian Banner. Upon completion of the merger, rather than going through an RFP process, the university evaluated the possibility of selecting one of their existing solutions. Since there were obstacles in consolidating with each of the existing solutions, Rutgers evaluated Oracle's Cloud options and decided to move forward with a full re-implementation of finance, procurement, human capital management (HCM), payroll, and student using a phased multi-year approach. Rutgers found a cloud migration attractive for several reasons: cloud deployment is the institution's strategic direction; it provides a high level of scalability; Oracle handles the infrastructure, applications, and updates; and cloud deployment supports configurations versus customizations. As a current Oracle customer, Oracle and Rutgers were able to handle the product licensing for purchasing the Oracle Cloud Suite as an upgrade rather than as a new procurement.

Since Rutgers University was already working with the units that came from UMDNJ to re-engineer its varied finance, procurement, human resources, and payroll processes into a unified operations strategy, the move to a new platform created a more collaborative atmosphere. Also, Rutgers was able to incorporate the functionality and design of the Oracle Cloud Suite into its operations strategy.

IMPLEMENTATION

Rutgers chose to deploy Oracle Cloud ERP first, scheduling the Oracle Cloud HCM deployment to follow and the Oracle Cloud Student to be deployed last. During the ERP deployment phase, Rutgers also began preparing for the upcoming Oracle Cloud HCM deployment by migrating the UMDNJ human resources and payroll employee data from Banner into Rutgers's existing PeopleSoft Human Resources and Payroll systems to create a single payroll feed.



Rutgers initially developed a year-long timeline for deploying Oracle Cloud ERP and extended the timeline by an additional six months to accommodate for data cleanup, data conversions, reworking the chart of accounts, and testing.

Phase 1, which started in October 2015, was comprised of four projects: (1) Oracle Cloud ERP deployment of general ledger and project/grant accounting, including a redesign of the chart of accounts; (2) procure to pay and expense management; (3) Ellucian Banner Human Resources and Payroll migration to Oracle PeopleSoft; and (4) deployment of Hyperion budgeting and financial planning tools.

Rutgers went live with Oracle ERP Cloud in October 2016. Rutgers was an early adopter and, at the time, the largest institution to go live on Oracle ERP Cloud. While Rutgers reports that the institution is pleased with Oracle ERP Cloud, in the early days following go-live, there were several rough patches in terms of maturity, especially in Grants Management. In hindsight, Rutgers identified some of the issues resulted because of its implementation process. Regardless, today Rutgers is happy with the solution, which provides the university with a streamlined, consolidated, and comprehensive finance system and reporting environment. The university also completed the migration of all employee records from the Banner Human Resources and Payroll system into Rutgers's existing hosted Peoplesoft System. In 2017, Rutgers continued with Phase 2, which addressed Accounts Receivable, Cash Management and Treasury.

An important component of the Oracle Cloud ERP implementation was change management that focused on encouraging stakeholder engagement. Rutgers convened business advisory groups for each project team and school/unit stakeholders on a monthly basis, while encouraging stakeholder communications and feedback from across the institution. Training was also critical to the success of the project, and Rutgers leveraged multiple training paths targeted at different user types, including train-the-trainer, power user, and campus training.



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BEST PRACTICES AND LESSONS LEARNED

Rutgers advises other institutions embarking on a cloud deployment, or any similar large-scale implementation initiative, to build in plenty of time for planning, process analysis, integrations, and testing. Gower and Norin recommend that institutions not pressure themselves to move faster. As an essential part of the shift to a SaaS-based deployment model, Rutgers committed to prioritizing improvements to process and structure and rethinking their policies. As part of this commitment, Rutgers laid out a “no modifications” ground rule that encouraged staff to align their operations with the new cloud platform’s functionality.

Rutgers shared several critical lessons learned. Institutions should invest in analyzing and cleansing existing data to ensure it is ready for data conversion. It is important to allocate sufficient time and resources for thorough testing. Another critical part of planning is to review an institution’s IT support structure and roles, since supporting cloud applications requires different skill sets. Cloud environments involve a constant cycle of new features, changes and regular upgrades that require institutions to adapt their processes and skill sets.

As the cloud structure has shifted most of the platform’s application development to the Oracle team, Rutgers has less ownership and control over modifications to the system. Staff skill sets have evolved from hands-on coding to specializing in areas such as integration and data handling. To keep up with the fast pace of Oracle’s comprehensive monthly releases, Rutgers is building a team of technical and operational subject matter experts dedicated to managing the upgrades. Gower reports that, in hindsight, Rutgers wishes it had allocated more resources to handling updates from the beginning, as they have lost some opportunity to keep up with product updates over the initial period. Now that the functional and IT subject matter experts have been identified, the team reviews Oracle’s release notes to evaluate new features and keep the broader Rutgers community informed of changes that will affect them.

SOLUTION STRENGTHS

Rutgers reports that Oracle has been reliable, consistently available, responsive and committed to working with the institution on a regular basis to improve its products. Oracle can efficiently scale the software, secure the institution’s data environment, and make investments in modifications and upgrades. Rutgers has benefited from relinquishing some of its previous responsibility to Oracle, who now manages all disaster recovery, infrastructure, and data security for these applications. As a result, Rutgers has scaled down some of its on-premises server environment and no longer has to worry about the obsolescence of equipment.



Gower also notes that moving to the cloud helped Rutgers transition some of its costs from a capital expense (CapEx) to an operational expense (OpEx), resulting in a more consistent and stable budgetary model for the core enterprise applications. By restructuring infrastructure costs, institutions have an opportunity to devote efforts towards exploring new technologies. One of the areas that Rutgers is interested in pursuing is leveraging automation and adaptive intelligence applications within the Oracle Cloud suite.

CURRENT PROJECT STATUS

In March 2020, Rutgers was wrapping up its ERP deployment and gearing up for both the HCM and Student system deployments when the COVID-19 pandemic hit. While the institution has shifted its focus to its ongoing COVID-19 response and planning, Rutgers decided not to halt the Oracle deployment project. The institution has extended its preparation period by focusing on operational processes and policies, such as comparing its human resources policy to that of UMDNJ to create a new policy. Rutgers is also reworking its chart of accounts based on its organizational structure. Overall, Rutgers expects a smooth HCM deployment, as the institution will benefit from the experiences of other schools that have already deployed Oracle Cloud HCM. These schools have helped shape Oracle's best practices and have allowed Oracle to standardize its product functionality.

To prepare for the deployment of Oracle Cloud Student, Rutgers is reviewing its structures around enrollment services, student support, and the processes associated with the lifecycle of a student. The institution plans to deploy the student financial aid module first, as it is the most mature part of Oracle's product. Following financial aid, Rutgers will align the release of ensuing modules with Oracle's development roadmap.

REFERENCES

As part of this research, Tambellini briefed with Michael Gower, Executive Vice President for Finance and Administration and University Treasurer at Rutgers University, and Michele Norin, Senior Vice President and Chief Information Officer at Rutgers University. Tambellini also gathered information in this study from www.rutgers.edu.

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The purpose of this report is to provide higher education institutions with information about the objectives, solutions, and outcomes related to the utilization of technology in colleges and universities across the US.

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