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September 19, 2008

The following is an update of the current activities of the CUNYfirst project and should be shared with professionals around the CUNY community.
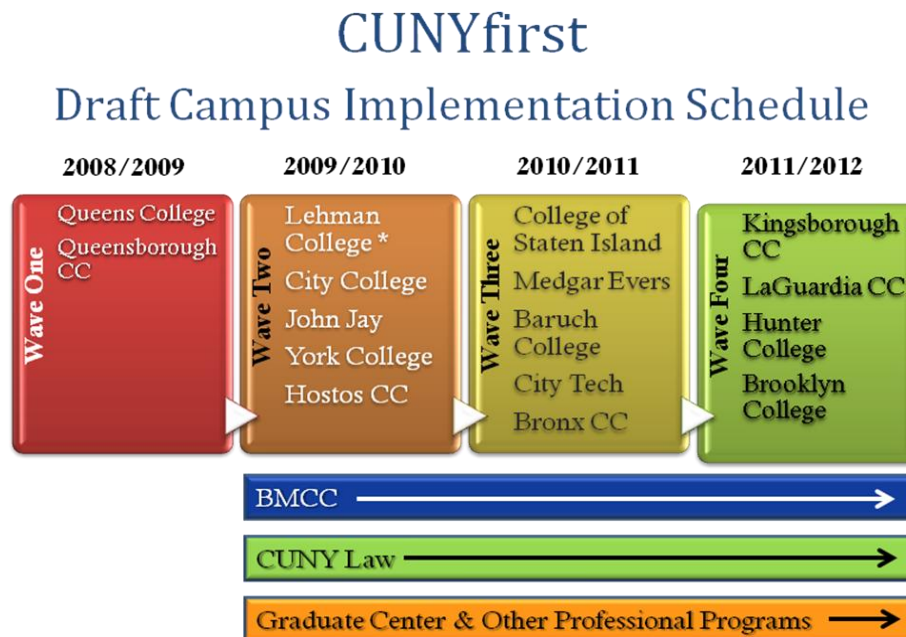
❖ *Student Administration (Campus Solutions) – Wave Plan Announced*

CUNY Associate Vice Chancellor and Chief Information Officer Brian Cohen introduced a draft schedule for the CUNYfirst student (Campus Solutions) implementation Monday at the CUNY Financial Management Conference. It details when colleges will implement new student service processes in the four years of the CUNYfirst implementation. (See graphic below)

The schedule was developed with the cooperation of CUNY college leadership and represents the readiness of the Wave Two campuses to fully accept the organizational changes needed to support the introduction of the new student processes. There may be a need to adjust this schedule over time as we measure the impact of implementing CUNYfirst at our Vanguard Colleges - Queens College and Queensborough Community College, or because of circumstances not known now.

Borough of Manhattan Community College, CUNY School of Law, and the Graduate Center and its professional programs will implement CUNYfirst within a three-year timeline. The reason for this is that BMCC and the Graduate Center do not use SIMS (Student Information Management Systems) and the Law School has a unique curriculum and shares some business processes with Queens College. There are plans to have five Wave Two Colleges. CUNYfirst has asked Lehman College President Dr. Ricardo Fernández to be part of the Wave Two launch.

The initial implementation takes place this school year.

CUNYfirst
Draft Campus Implementation Schedule

2008/2009	2009/2010	2010/2011	2011/2012
Wave One Queens College, Queensborough CC	**Wave Two** Lehman College *, City College, John Jay, York College, Hostos CC	**Wave Three** College of Staten Island, Medgar Evers, Baruch College, City Tech, Bronx CC	**Wave Four** Kingsborough CC, LaGuardia CC, Hunter College, Brooklyn College

BMCC ⟶

CUNY Law ⟶

Graduate Center & Other Professional Programs ⟶

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❖ *Finance – General Ledger*

The CUNYfirst General Ledger continues toward stabilization.

It is important to remind GL users of the process to receive help. Each campus Help Desk must be the first stop if someone needs assistance. In some cases, users have called the Central Office Help Desk or project leads Bill Fox or Lynne Rosa. The process we have established for CUNYfirst is the first line of assistance comes from the local resource. It is important so we can track issues to see if there are common problems or errors, or if something might require additional communication and/or training. We have also established a peer network and users are taking advantage of a listserv that was created to address issues and solve problems with help from their colleagues. While they are extremely valuable resources, calls to Bill Fox and Lynne Rosa for assistance should be rare. Call your college or university office Help Desk first and they'll open a case and find an answer.

Also, campus application security liaisons are the only ones who can add users to the CUNYfirst General Ledger following completion of training. In the case of University Office staff, there is a security liaison that performs that function.

❖ *Training Update – General Ledger*

The full suite of introductory GL classes will be taught at Brooklyn College September 24. Morning sessions will cover the three areas needed for access to the General Ledger – Introduction to CUNYfirst Financials, Chartfield Structure and Introduction to the General Ledger. Spreadsheet upload and report training will be held in the afternoon. Those needing the training should access the Enterprise Learning Management (ELM) system for information and to register for the classes.

❖ *Single Sign-On*

The process to allow users to use a single logon to get access to the CUNYfirst General Ledger, ELM and the Customer Relations Management (CRM) systems and spreadsheet upload functions is undergoing rigorous testing at this time. When that is complete and a go-live date has been identified, we will send instructions on this to all users or identified users of the GL. Single sign-on will be how we operate for all access to CUNYfirst once this is launched.

❖ *Finance – Procurement*

Accounts payable and purchasing configurers met Wednesday to continue their introduction to PeopleSoft Procurement processes. They met to discuss various aspects of the procurement processes and they will be configured. What lies ahead for the Procurement team is creation of a plan to clean up CUNY's Vendor files to eliminate duplicates so it can be loaded into the system for go-live.

❖ *Student Administration – Campus Solutions*

The Campus Solutions team is completing configuration of the CUNYfirst Student Records and Student Financials processes in advance of the Vanguard College implementation. Systems Integration Testing (SIT) on Student Records began this week and it presented a number of challenges. Future SIT sessions are being scheduled.

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❖ *Human Resources – Human Capital Management*

The HR/Benefits team spent the week preparing for the upcoming Systems Integration Testing that begins October 6. Campus and university office Subject Matter Experts (SME's) will be asked to participate in two two-week cycles of training from October 20 – 31, and from November 3 – 14.

❖ *CUNY Financial Management Conference*

More than 130 people from around the university attended a CUNYfirst status update at the 2008 7th Annual CUNY Financial Management Conference on Monday, September 15. The presentation focused on the lessons we learned in implementing the CUNYfirst General Ledger, and a look ahead at the next steps in the areas of Human Resources, Student Financials, Procurement, Organizational Readiness and Training. There was a valuable question and answer session at the end covering all subjects.

❖ *Upcoming Meetings – Organizational Readiness*

Getting Ready for CUNYfirst - A workshop for clerical staff and their supervisors.
September 22 – Queensborough Community College,
September 24 – Queens College.

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Meet the CUNYfirst Training Team

(Left to Right – Kevin Fennell, Melissa Grant, Anna Tsimakas,
Shanna Roberts, Adam Kleinberger, Adante Harvey)

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Let us introduce our Training Team, led by Training Manager Adante Harvey. This coming year team will be responsible for creating classroom material and leading the efforts to train trainers for our Human Resources, Procurement and Planning and Budget launches throughout the university and for the Student Administration processes for the Vanguard Colleges – Queens and Queensborough.

- Adante Harvey - Training Manager: Managed three Fortune 100 full lifecycle ERP implementations across 15 locations. Managed training, communication and business process design for 40,000 users across 52 US locations.
- Shanna Roberts – Trainer: with the CUNYfirst project focusing on training for the HCM & Benefits. Previously worked at Medgar Evers College first in the Office of Financial Aid, then transitioned to Human Resources, and then to Training & Staff Development. Creates training materials for the project. Focusing on training for GL, HCM & Benefits.
- Kevin Fennell - Trainer: Began his training career at the U.S. Postal Service during its major conversion to a new retail and accounting system. He has extensive experience in teaching Microsoft Office applications at business schools in the tri-state area, and most recently was a member of the training team at the New York law firm Dewey and LeBoeuf. He will focus on Student processes.
- Melissa Grant - Trainer: Joined us from Long Island University's Brooklyn Campus, where she served as the Director of First-Year Programs and as a lead trainer for their ERP implementation. She also brings over a decade of experience as a teacher at both the college and secondary school level. Melissa will focus on training on Student Processes.
- Adam Kleinberger - Trainer: Adam spent four years at Boris FX/Artel Software, a special effects software manufacturer where he developed training materials, demo-ed at major trade shows, and performed training for clients like Turner Broadcasting, Blue Rock Editing, MTV, and FOX. He will focus on the HR pillar.
- Anna Tsimakas - Trainer: Has an educational background is in Micro-Computers and networking. She comes to CUNYfirst with 7 years of training experience with Pharmaceutical, Utility and Telecommunication Industries. Anna's initial focus will be on Student processes.

Campus teams are meeting regularly. If you'd like a representative from one of our teams to attend, please let me know.

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