

## Fridays @ first

October 10, 2008

The following is an update of the current activities of the CUNYfirst project and should be shared with professionals around the CUNY community.

### ❖ **Finance – Planning & Budget**

A high level overview of the Planning and Budget module was given to Budget and Business Managers on Thursday, October 9. During the meeting they heard the timeline for this part of the Project, some of the terms and processes that will be available upon launch and were shown a demonstration of the out of the box line item and position budgeting processes. They learned how information from other pillar data bases, particularly personnel data, will be extracted and transferred for the work they will do in making their college's financial plans. It was important to note that the work that will go on in the Planning and Budget functions is the creation and monitoring financial plans. It was also explained that in the new environment, there will be new roles – Preparer and Reviewer. A preparer does that, gathers information and creates plans and submits them to a reviewer who will modify, approve and then submit budgets.

### ❖ **Finance - Procurement**

Nearly 50 people from around CUNY who represent non tax-levy entities attended a session Wednesday, October 8 to see the end-to-end Procurement processes, from requisition to payment. What followed the demonstration was a discussion about how procurement processes are currently done on campuses and at the university offices. What we learned is there is little uniformity across the university. The challenge is to create those uniform processes to fit our needs locally and globally.

### ❖ **Training – Human Resources**

The Training Needs Analysis for upcoming Human Resource training has begun. Our training team has visited John Jay, Queens, Hunter, Medgar Evers and York Colleges, Queensborough and LaGuardia Community Colleges and City Tech and CUNY Law. The Training Needs Analysis is an opportunity for campus HR people to meet with their training liaison to evaluate what is needed to support successful learning. Part of this question and answer session is also to help determine if additional skills training (learning Excel or other Microsoft Office Suite software) may be required to support optimal use of CUNYfirst processes. Next week, the team travels to College of Staten Island, Baruch College and Kingsborough and Borough of Manhattan Community Colleges.

### ❖ **Student Administration – Campus Solutions**

The CUNYfirst Student team is continuing its conversion of data for students and our Vanguard Colleges – Queens College and Queensborough Community College – from SIMS to CUNYfirst. The specific focus right now is the conversion and verification of transcript data.

Also, Systems Integration Testing (SIT) is being scheduled for Student Records. This is our first opportunity to test the CUNYfirst Student systems against real scenarios. Once we put the systems through the paces, the Student team will call on professionals from around the university who work in our Registrar offices to test the system. That's called Users Acceptance Training (UAT). We will be sending a request for testers once tests are scheduled. While Queens and Queensborough will be the first to use new processes, we need people from

## Fridays @ first

around CUNY to see if they work, since those processes will be the ones they use when we launch CUNYfirst at their college.

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### **Coming Up:**

CUNYfirst Project and Change Management Liaisons will meet via computer/phone next Friday, October 17 to discuss progress and answer questions about the HR Organizational Readiness checklist.

October 31 – Campus Executives, Finance and HR Liaisons will meet at the Graduate Center Skylight Room from 1 – 3:30. This will be a discussion on department reconciliation of their department/ Chart of Account structure and related security roles. The CUNY first Core HCM team will explain the campus tasks for this reconciliation as well as update the current status of HCM.

Members of the CUNYfirst Core Team have attended many campus team meetings and are looking to schedule others. Also, we have requested that HR liaisons to schedule a demonstration of new processes for our clerical staffs. Please let us know when those demonstrations are scheduled so we can provide support.

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## **firstSnapshot Language/Glossary**

Every week, Fridays @ first takes a stab at questions about the Project or provide some clarity to terms being used. They will also be available on the Project website – <http://first.cuny.edu>. If you have questions, send them to [cunyfirst@mail.cuny.edu](mailto:cunyfirst@mail.cuny.edu)

### **Common CUNYfirst Terms**

#### *Campus Solutions*

This is the umbrella term for the suite of software designed to serve our student population. Currently, the Campus Solutions team is focused on implementing the following processes for our Vanguard Colleges – Queens College and Queensborough Community College: Student Records, Student Financials, Registration and Course Catalog. These will allow students at those colleges to register for the Summer and Fall 2009 terms, and for our professionals to support them. We will add Financial Aid during Wave Two (spring 2010) and Admissions later as more colleges come on board. When you hear Campus Solutions, think Student Support and Administration.

#### *Procurement*

Another umbrella, denoting the change to CUNYfirst processes for Purchasing, Accounts Payable and Expenses. The work here, as described above, will allow seamless management and monitoring our financial processes from request to payment, doing on-line what many of our professionals do on paper, and integrating across departments so that we do our purchasing and chart our expenses in a uniform way.

## Fridays @ first

### *Application Security*

The CUNYfirst processes that are being developed do not fall into a “one-size fits all” category, where we can make everything available to everyone. Individuals will have access to specific processes that match their current job. As we learn more about the functions of the software, campus leaders will “map” functions to a person’s role in the department – that is if you do A, they will make sure you have access to the CUNYfirst processes that allow you to do A. Each campus team has an Application Security liaison. His/her role in the project is to turn on or turn off access to the various processes, based on your role. This ensures that you are only given access to the data you need and no more. This security also means that our records – employee or student – are only available to those whose job is defined to serve our specific needs.

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### New to CUNYfirst:

We welcome two new members of the team – Somaiya Arefeen and Josephine Vidal. Somaiya is the Student Records Subject Matter Expert, focusing on the full implementation of the Student Records. She joins us with nearly six years of experience in student records; she was an Assistant Registrar at Baruch College.

Josephine Vidal is the CUNYfirst Planning and Budget Architect. She is also CUNY’s Assistant Budget Director. She will wear these two hats during the one-year implementation of this module. Josephine has been at CUNY for four years, focused on financial planning. A life-long New Yorker, she attended Fordham University where she received her bachelor’s degree and her MBA.

Have a good next week.

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