

FIRST EDITION

The CUNY FIRST Project Newsletter for Lehman College

Volume 1, Issue 2

October **FIRST**, 2007

CUNY FIRST PROJECT MISSION

The mission of the CUNY FIRST Project is to implement a University - wide suite of policies, processes and technologically advanced information systems that will enable the University to streamline its processes and use its resources more efficiently to meet the needs of our students, faculty and staff.

PROJECT OBJECTIVES

- ⇒ Integrate our Environment for Better Efficiency
- ⇒ Improve Decision Making
- ⇒ Deliver Improved Student Services
- ⇒ Establish University-wide Policies

CUNY FIRST Core Team

Executive Sponsor
Allan Dobrin
Executive Vice Chancellor
Chief Operating Officer

Project Leaders
Brian Cohen
Chief Information Officer

Ronald Spalter
Deputy Chief Operating Officer

Project Director
Suman Taneja

Lehman College Campus Executive
Milton Santiago
Deputy to the President

GET THE LATEST PROJECT INFORMATION AT

<http://first.cuny.edu>

CUNY Staff Focused on Service, Teamwork Ready for FIRST Project

A CUNY-wide assessment aimed at guiding efforts to introduce the CUNY FIRST Project and guide its acceptance revealed that people around the university are focused on satisfying their customers.

“Our colleagues around CUNY are ready for change and are confident that a positive change is coming,” said Ronald Spalter, CUNY FIRST Project Leader and Deputy Chief Operating Officer. “We are truly coming together as a University.”

Among the findings of nearly 2,000 people who took the survey:

- 92% are confident they can learn new ways of doing things;
- 63% believe their campus leadership is committed to the success of the project;
- Almost 60% agree that the new system will be a great benefit for their customers and state that they are enthusiastic about ERP bringing about a big change for the better;
- 66% believe they will receive training and support to learn the new system.

The survey was conducted by the Baruch Survey Research Group in June.

A Summer of Accomplishments

As the clock moved from Summer to Autumn, so did the CUNY FIRST Project Calendar. October will begin Fit / Gap activities for Student Finance and Financial Aid - beginning work on creating the optimal systems for how our students receive aid and how we assess and collect charges, like tuition, fees and fines.

We'll also begin the important design work for the Financial Process, building the General Ledger modules, schedule to go live in July 2008.

Looking back at the last few months, where hundreds from around the university took part in Prototype and Fit/Gap sessions reveals that:

- **Academic structure**, a deliverable from the Provost's is almost complete.
- The **chart of accounts** has been agreed upon one month ahead of schedule
- The **fit/gap** process is almost complete for **General Ledger**, our first FIRST deliverable, as well as for **Human Resources**, which will go live next Fall 2008.

To understand the degree of involvement, over 300 people from around CUNY attended over 100 Fit / Gap and Prototype sessions. There were nearly 75 individual sessions for the various processes for Human Resources alone.

PRESENTING CUNY FIRST

CUNY Financial Conference September 26, 2007

Members of CUNY's Financial community saw, some for the first time, the scope of changes coming when CUNY FIRST launches the new General Ledger next Summer. Project Manager Suman Taneja explained what's next; designing the new processes, configuration, the creation of training materials and user training, testing and then the transition into production. CUNY FIRST Finance Lead Bill Fox explained what current business processes will go away and how they will be replaced throughout the life of the Project.

Student Success Demonstration September 28, 2007

Two days later, members of the Student Administration team, led by Module Lead Stu Schaffer, presented a demonstration of various student and administrative functions for members of 11 CUNY Academic & Student Councils. The purpose was to familiarize those whose work focuses on student services to understand how processes will change in the future - like how students are identified, registered, and are charged tuition and fees. Attendees learned how PeopleSoft processes will allow real-time ability to see a student's status, and allow day-of adjustments during registration.

Key Dates October 2007

October 16 - CUNY FIRST Steering Committee

October 18 - CUNY FIRST Campus Executives Meeting

Student Administration Fit /Gap & Finance Design Sessions Throughout October

Check the CUNY FIRST Calendars
<http://first.cuny.edu>

Monthly Feature - The Language of CUNY FIRST**A Glossary of Terms for CUNY FIRST**

As we move forward on the CUNY FIRST Project, we'll learn a new language. There are numerous project-related words and acronyms that we'll hear during every phase of the project.

Our FIRST application to "GO LIVE" (become functional throughout CUNY when tested, evaluated and re-tested with every user trained and supported) is **General Ledger**. In this issue, we'll explore some of the terms used in working with the General Ledger.

General Ledger - The official record of financial transactions. The General Ledger includes budget transactions, revenue and expense transactions, encumbrances, assets, liabilities and fund balances. The General Ledger includes budget transactions, revenue and expense transactions, encumbrances, assets, liabilities and fund balances. Most financial reports flow from the General Ledger.

Chart of Accounts - A ChartField that tracks Asset, Liability, Net Asset, Revenue, Expense classifications. The Chart of Accounts serves as a framework for all financial transactions. Reports can be generated by any chart field.

ChartField - A field that stores data in the Chart of Accounts. Some examples of ChartField are fund, account, department, major purpose and program.

Business Unit - A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

Department
A PeopleSoft ChartField that tracks academic or administrative units within CUNY's organizational hierarchy. A Department must have an ongoing business purpose and a permanent budget.

Journal - A batch of accounting entries entered online or input from a feeder system (payables, receivables, asset management, and so on) to the general ledger. Consists of multiple journal lines and one Journal Header, identified by the Journal ID. Information about the journal as a whole is stored in the Journal Header table.

FIND MORE GLOSSARY

*TERMS AND
FREQUENTLY ASKED
QUESTIONS AT*

<http://first.cuny.edu>

CUNY FIRST EDITION

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Active with Academics

By James Russell—CUNY FIRST Academic Integration Manager

We've developed a new liaison position for departmental chairs! The "Faculty Chair Liaisons" are current or past departmental chair persons that will help project team members ensure that CUNY FIRST meets the needs of academic departments through the development of various "toolkits" and reports. The chair person's toolkit will be a CUNY specific subset of the delivered functionality of the PeopleSoft Human Resources, Finance, and Campus Solutions applications that will serve to support the important work that an academic chair does.

The CUNY First Project has also been engaging the academic leadership of the colleges through presentations, discussions and review of some of the project's preliminary work. One of the first tasks for our academic community was working with the Chief Academic Officers to approve "academic structure".

Academic structure, in this case, is a group of foundations tables that help describe the touch points between our students and the way we have structured our schools and programs. These tables will help ensure that the components of CUNY FIRST are optimized for the needs of CUNY students at all of our colleges.

Finally, we welcome Prof. Michelle Fraboni (michelle.fraboni@mail.cuny.edu) from Queens College as the Process Owners Designee from Executive Vice Chancellor and University Provost Selma Botman. Prof. Fraboni represent the interests of the Vice Chancellor as we proceed with development of student-related processes. At the CUNY IT Conference on November 30th at John Jay College, Prof. Fraboni and others will demonstrate some of the new features that CUNY faculty members will see in the PeopleSoft environment.

Lehman College's FIRST Campus Team

Milton Santiago
Lehman College
Campus Executive

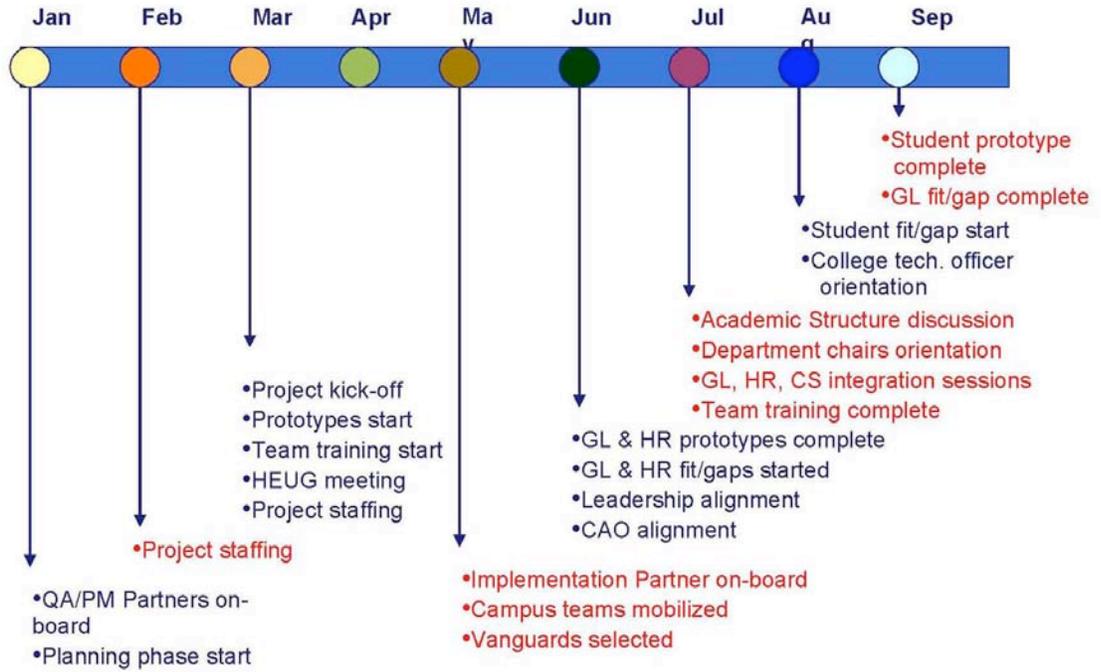
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Functional Lead-Student
Faculty Liaison
Change Mgt.-Organizational Readiness
Communications Liaison
Training Liaison
Security Liaison

CUNY FIRST - WHERE WE'VE BEEN



The Journey So Far



CUNY FIRST - WHERE WE'RE GOING

