CU Ny



Town Hall Meeting

January 9, 2009



Fully Integrated Resources & Services Tools



Agenda

Welcome

Overview

Finance

Human Resources

Student

Training and Help Desk

Q & A

Tour





What is the CUNYfirst?

CUNYfirst stands for CUNY Fully
Integrated Resources and Services Tool. It is
a university-wide initiative to integrate and
standardize business processes for all CUNY
Colleges. At its core, it is the replacement of
major systems in the areas of Finance,
Human Resources and Student
Administration, with one new fully integrated
system solution.





Why do we need CUNYfirst?

- Existing CUNY systems are archaic and difficult to maintain.
- Existing CUNY systems are failing
- Security and access controls of the existing systems are insufficient and antiquated.
- The lack of integration leads to redundant and inaccurate information.
- CUNY colleges maintain different processes to perform similar functions.





What are the benefits?

- ✓ Accurate and timely information to better serve students, faculty and staff
- ✓ Replacement of aging computer systems
- **✓** Self-Service
- **✓** Integration
- ✓ Industry Best Practices
- ✓ Standardization without loss of identity





What will be effected?

Financials	Student Administration	Human Resource Management
 General Ledger Budgeting Purchasing Accounts Payable Accounts Receivable Fixed Assets Treasury and Cash Management 	 Financial Aid Bursar Registrar Academic Advisement Admissions 	 Human Resources Recruiting Benefits Administration Time & Attendance Payroll





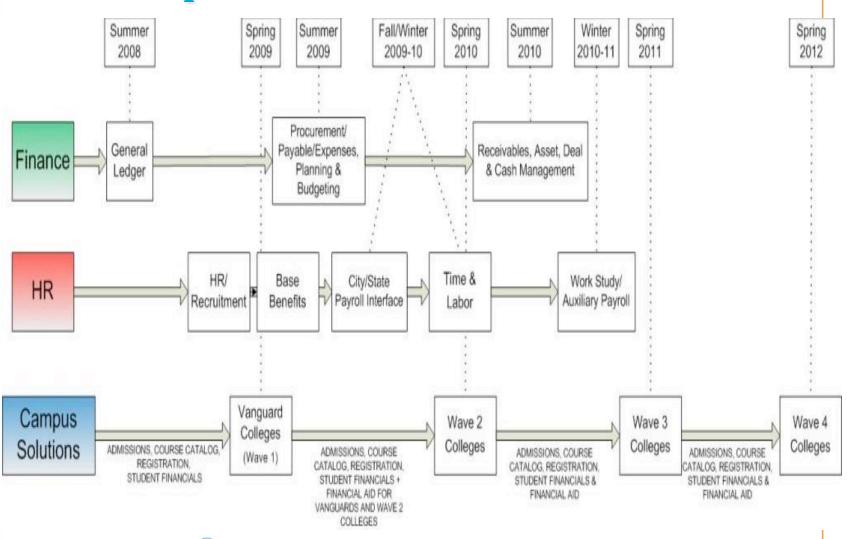
What will it mean for us?

- The short answer: The CUNYfirst Project will require us to learn and adopt new ways to do our work.
- Subject matter experts from every campus have been engaged in analyzing every aspect of our current processes.
- There will be changes, depending on the revised business processes and the technical solutions developed to meet those needs.
- Job skills training will be provided so everyone can increase their skills to work with the new system and functions.





Implementation Timeline







Finance Pillar

Presenter:

J. Edward Robinson

Business Manager
Campus CUNYfirst Finance
Subject Matter Expert





Finance Pillar

- The Finance Pillar includes several modules:
 - Accounts Payable
 - Student's Accounts Receivable
 - Budget
 - Expense
 - Fixed Assets
 - General Ledger
 - Procurement and Reporting





Finance Pillar: Module Status

Developing Launched
Planning

Assets
Management
Cash
Management

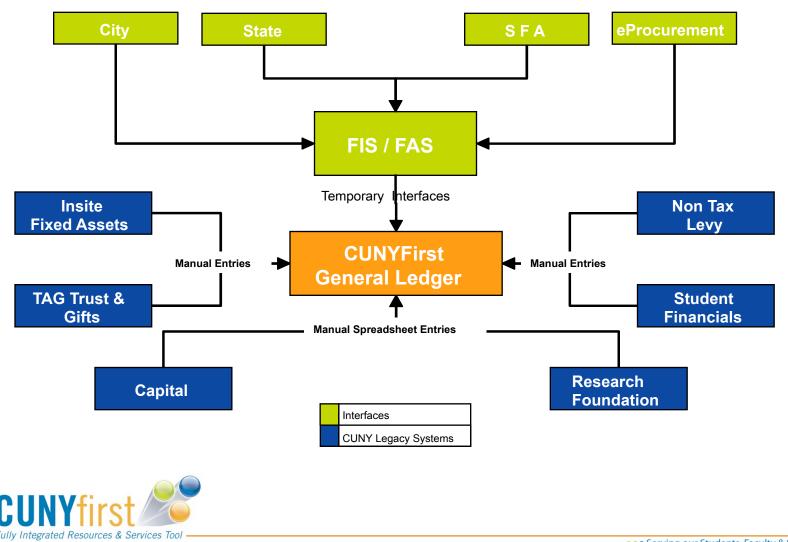
Procurement
Purchasing
Accounts Payable
Budgeting

General Ledger





General Ledger Overview - 7/1/08





Procurement

Ordering items electronically with contracted vendors

Instant budget comparison, creating PO's Instant monitoring to see what is ordered and charged

Payable staff has same information as departments on all orders

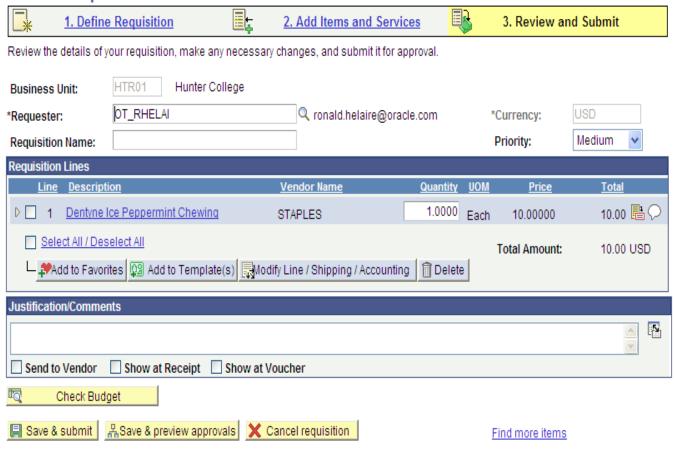
Process is transparent and efficient





Support Staff

Create Requisition





Central Stores Staff

Maintain Receipts

Receiving

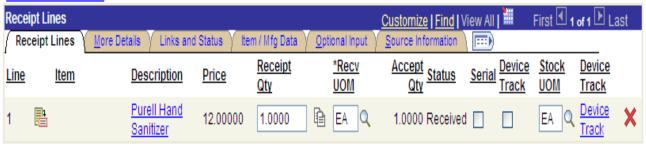
Business Unit: HTR01 Receipt Status: Received

Receipt ID: 0000000035 Add Comments Activities

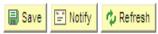
Header Details Document Status

▶ Header

Select Purchase Order



Interface Receipt









Accounts Payable Staff

CUNYfirst 😂				MultiChannel Console	
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	ce Information	ayments <u>Y</u> oucher Attributes <u>Y</u> Error Sum	mary \		
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Voucher Regular	Action:	Run Print Invoic			
Style: Copy from a Source Document					
PO Unit: Purchase Order:	Сору	Option:	~		
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Location: MAIN	Accounting Date:	07/28/2008			
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Procurement Schedule

• Summer '08 Fall '08 Winter'09 Spring '09 Summer'09

Fit/Gap-Configuration

Validation

Vendor Decisions

Business Process Analysis

Testing Training







Human Resources Pillar

Presenter:

Eric Washington

Director of Human Resources
Campus CUNYfirst Human Resources
Functional Lead





Human Resources Pillar

- Talent Acquisition Management (TAM)
- Human Capital Management (HCM)





Position Management

- Using the CUNYfirst Manager Self-Service (MSS) a Department Manager initiates a hiring request.
- The recruiter in the HR department then begins using the CUNYfirst Talent Acquisition Management (TAM) to process the request.





Talent Acquisition Management (TAM)

- The Department Manager is now collaborating with the recruiter, affirmative action officer and HR to:
 - > prepare the job opening
 - > manage search processes
 - > schedule interviews
 - > approve job offers through on-line processing
- The Budget Office is contacted to make sure the position can be filled.





Manager Self-Service (MSS)



- View employee summary data online, including direct and indirect reports
- View custom job summary page to determine if employee is working in multiple jobs and/or campuses
- Online reappointment process for employees
- Request new positions and change position attributes through workflow approval





Manager Self-Service (MSS)

Main Menu > Manager Self Service >		
Job and Personal Information		Edit "Job and Personal Information"
Manage job and personal information for your employees.		
View Employee Personal Info Review job and personal information for your employees.	Quick Hire Request Submit a request to hire an employee outside the recruitment process.	View Quick Hire Request View: a request to hire an employee outside the recruitment process.
Appoint Employee to New Position Initiate a request to promote an employee.	View Appoint Employee to New Position Review the status of an employee promotion request.	Approve Appoint Employee to New Position Approve or deny a request to promote an employee.
Request New/Change Position Status Submit a request for a new position or modify the features of an existing position, such as a promotion in place.	View New/Change Position Status Review the status of a new/change position status	Approve New/Change Position Status Approve or deny a request to create or change a position
Request Discretionary Salary Change Request a salary change for employees when no allocated budget exists.	View Discretionary Salary Change View salary change transaction details and approval status.	Approve Discretionary Salary Change Approve or deny pending salary change requests.
Employee Separation/Retirement Submit a seperation or retirement request for an employee.	View Separation/Retirement View salary change transaction details and approval status.	Approve Employee Separation Request Approve or deny pending salary change requests.
Reappointments Request Mass Re-Appointments and Non-Reappointments		



MSS: View Direct Reports

Appoint Employee to a New Position

Initiate a request to appoint an employee to a new position.

Instructions

Paparte Tor

Select the employee. You will be able to process only those employees that report to you as of the date entered on the first page.

Once you have finished click Continue to enter the details.

COLEEN CORSO

Cancel

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	Continue							
ı	Select Employee							
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<u>Name</u>	EmplID	Red# Pay Status	<u>Full-Part</u>	HR Status	Position	Job Code	<u>Description</u>	DeptID	<u>Department</u>
O Cecilia Garrido	0192	0 Active	Full-Time	Active	55555561	4008	ASSISTANT PROFESSOR	1070	ACADEMIC AFFAIRS
O Jane Smtih	0214	0 Active	Full-Time	Active	55555561	4008	ASSISTANT PROFESSOR	1070	ACADEMIC AFFAIRS
O Test Tenure	0223	0 Active	Full-Time	Active	55555600	4024	ASSOCIATE PROFESSOR	4445	ADMISSIONS

Continue

Return to Manager Self-Service

Return to Job and Personal Information



Find First 1.3 of 3 Last



MSS: Reappointment Processing

Re-Appointments/Non-Re-Appointments

Select the employees whose re-appointments you wish to process.

▼ Instructions

<<Configurable Instructions here>>

Cancel

Select Employees

Reports To: << Manager Name >>

As Of: 07/15/2008

Continue

Select Employee							<u>Find</u>	First 🗹 🗗	2 of 2 🕑 Last
<u>Name</u>	<u>EmplID</u>	<u>Empl</u> Rcd#	<u>Pav</u> Status	<u>HR</u> Status	<u>Position</u>	<u>Description</u>	<u>Con</u> <u>Title</u>	<u>tract</u> <u>:</u>	<u>Notify</u> Status
Joseph Johnson	00000019	0	Active	Active	00100029	Dir of Admin	HEO		Mar Notified
Tammy Thompson	00000020	0	Active	Active	00100028	Dir of Admin	HEO		
Joseph Johnson	00000019	0	Active	Active	00100031	Bursar	HEO		Mar Notified
Tammy Thompson	00000020	0	Active	Active	00100030	Asst Bursar	Asst to HEC)	_

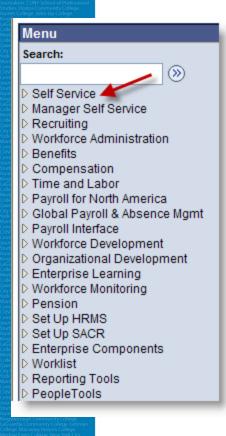
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Return to Manager Self Service





Employee Self-Service (ESS)



- Employee will have access to view personal information and see that it is correct
- Employee will be able to make certain personal changes on-line such as emergency contact information





Employee Self-Service (ESS)





ESS: View/Modify Personal Information

Personal Information

Thomas Jones

Name

Thomas Jones

Change name

Addresses				
Address Type	<u>Status</u>	As Of	Country	<u>Address</u>
Home	Current	06/16/2008	USA	1007 Fairlawn Avenue New York, NY 10001
Mailing	Current	09/22/2008	USA	PO Box 4329 New York, NY 10001
Home	Submitted for Approval	06/16/2008	USA	1007 Fairlawn Avenue Apt. 3 New York, NY 10001

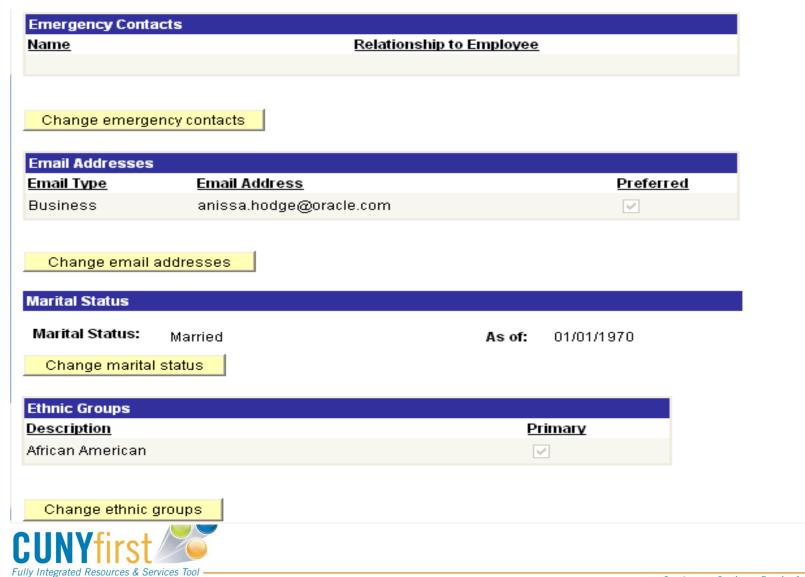
Change home/mailing addresses

Phone Numbers			
Phone Type	<u>Phone Number</u>	<u>Extension</u>	<u>Preferred</u>
FAX	212/555-1111		
Home	212/555-1212		✓





ESS: View/Modify Personal Information





ESS: View Compensation History

Compensation History

Nicole Jansen

From: 01/01/1900 To: 05/28/2008

View Another Date Range

Employee Job Information

EmpliD: 0310

Department: DEAN FOR ACADEMIC AFFAIRS

Job Title: Dean

Payroll Status: Active

Salary History

<u>Date of Action Reason Annual Compensation Salary per Frequency</u>

01/01/1970 New Hire Appointment 90,763.000 USD 3,490.884615 USD Biweekly



ESS: Benefits Self-Service

Benefits Summary

Tom Jones

To view your benefits as of another date, enter the date and click Go:

09/03/2008 🛐

Go

Type of Benefit	Plan Description	Coverage or Participation
Health Plan	GHI-CBP/BCBS w/Rider less Rx	Family (with Domesti
Tax Deferred Annuity	HRC TDA Plan	15% Before Tax
Deferred Compensation	NYS Deferred Comp Plan	17% Before Tax
529 College Savings Plan	NYS College Savings Plan	\$50 After Tax
Health Care Flex Spending Acct	Healthcare Flexible Spending	\$1,500 Pledge
Dependent Care Assist Program	Dependent Care Asst Program	\$2,500 Pledge
Retirement Systems/Program	Optional Retirement Pgm Tier 5	0% of Earnings

Go to:





HR, Recruitment, Base Benefits Schedule

Summer '08 Fall Winter '09 Spring Summer

CRP - Configuration

Validation

Data Clean Up / Mapping to Data Fields

Testing

Training







Student Pillar

Presenter:

Jim Russell

CUNYfirst Academic Integration

Manager





Student Administration Pillar (Campus Solutions)

- Student Records (Registrar Functions)
- Student Financials (Bursar Functions)
- Financial Aid
- Academic Structure (Divisions, Degrees, Majors, Minors...)
- Admissions and Recruiting





Campus Solutions

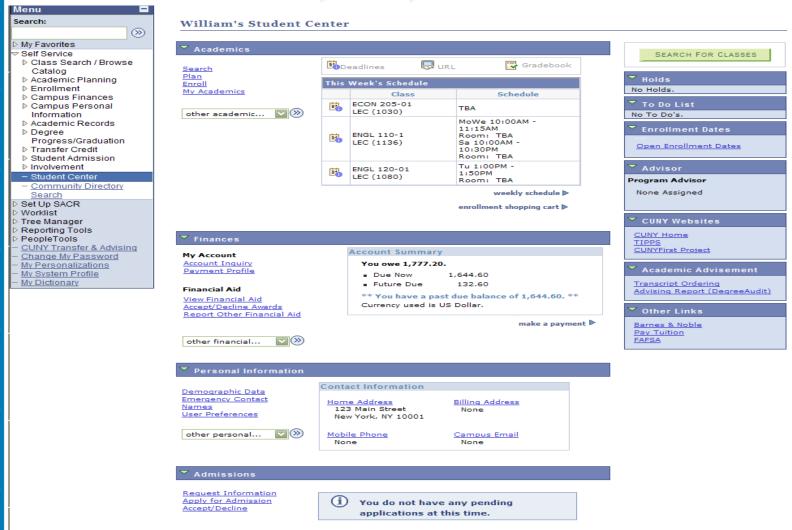
What will CUNYfirst do for students?

- •It will deliver improved services for all students.
- •Self-Service students will have access to all services in one integrated system.
- •Course offerings will be displayed in real time.
- •All academic departments will have an administrative view of student information.



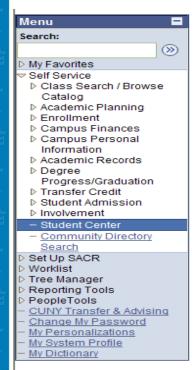


Student Center Schedule, Bill, Notifications





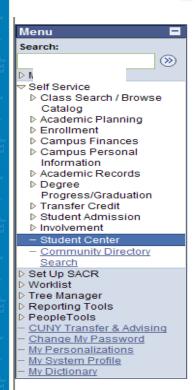
Student - Schedule by Class







Student - Add Classes





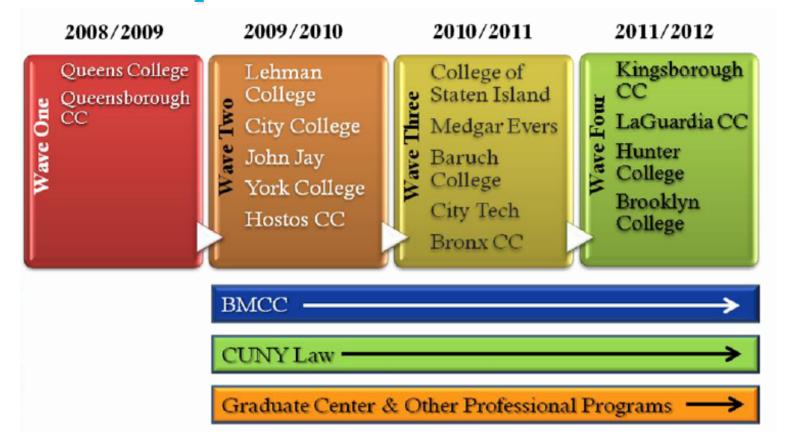


Faculty Center

Search: **Faculty Center** (%) Class Roster My Favorites - Faculty Center - Grade Roster HIST 111 - 01 The French Revolution - Add to Favorites Lecture (1031) - Edit Favorites Self Service 2008 Spring Term | Regular Academic Session | Queens College | Undergraduate Manager Self Service ¬ Meeting Information Recruiting > Workforce Administration **Days & Times** Instructor Meeting Dates Benefits M 11:00AM - 1:30PM Jefferson 505 02/01/2008 - 05/25/2008 Thomas Smith Compensation Stock Time and Labor change *Enrollment Status | Enrolled Payroll for North America Global Payroll & Absence Mamt Enrollment Capacity Enrolled 2 Dropped 0 Waitlisted 0 Pavroll Interface View FERPA Statement > Organizational Development Enterprise Learning Workforce Monitoring Select display option: Link to Photos Include photos in list Pension Campus Community Student Recruiting **Enrolled Students** Customize | Find | First 1-2 of 2 Last Student Admissions Grade Records and Enrollment Notify ID Units Program and Plan Name Level Basis Curriculum Management Financial Aid Bachelor of Arts -0195 Brinkworth, Jessica Graded Lower Freshman Undeclared Major > Student Financials Undeclared -> Academic Advisement 0115 Jones, Chris J 2 Graded 3.00 Lower Freshman Undeclared Major Contributor Relations Set Up HRMS Set Up SACR Enterprise Components NOTIFY SELECTED STUDENTS NOTIFY LISTED STUDENTS PRINTER FRIENDLY VERSION D Application Diagnostics ▶ Tree Manager ▶ Reporting Tools Return to Faculty Center ▶ PeopleTools Student Center - Careers - Change My Password Fully Integrated Resources & Services Tool



Campus Solutions Implementation Schedule







Training and Help Desk

Presenter:

John Dono

Assistant Manager User and Program Support Services

Campus CUNYfirst Training and Technical Readiness Liaison





Role-Mapping and Training



- CUNYfirst system security is "role-based" meaning that only those assigned roles will have access to the system
- CUNYfirst system security roles = your current job functions mapped to the CUNYfirst system
- □ Training curriculum will be role-based
- □ Participants will be scheduled for classes specifically targeted to their roles







works at Lehman
College as an
academic dept
secretary. One of her
current job functions
include accessing
student information
to update records
(e.g., course
registration and
scheduling) in SIMS.

Employee X will be mapped to the appropriate CUNYfirst system role(s) that align with the student record updates she can currently make in SIMS.

Employee X will attend the appropriate training courses that correspond with the role(s) mapped to the CUNYfirst system based on her current functions relating to the use of SIMS.

Employee X will be assigned to the appropriate security role(s) in the CUNYfirst system so she can perform similar tasks as those in SIMS (e.g., update student record information).

Employee X has received training and understands what her roles are in the CUNYfirst system. Employee X will need to log on to the CUNYfirst system and validate her access. She will be prepared for CUNYfirst system go-live.





How is CUNYfirst End User Training Provided?

- In-person / classroom setting
- Online training
- Documentation
- Campus Peer User Group





Borough Training Centers

- Brooklyn College
- City College
- College of Staten Island
- Hostos Community College
- Queens College

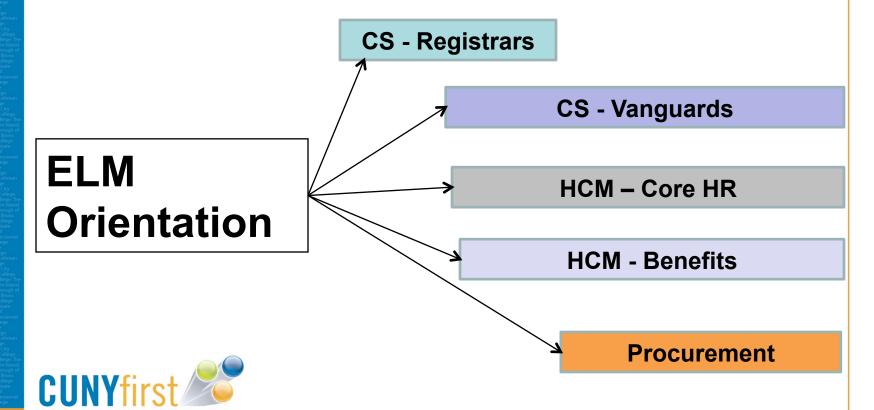




Timeline of Training Activities

Summer '08 Fall Winter '09 Spring Summer

GL Training





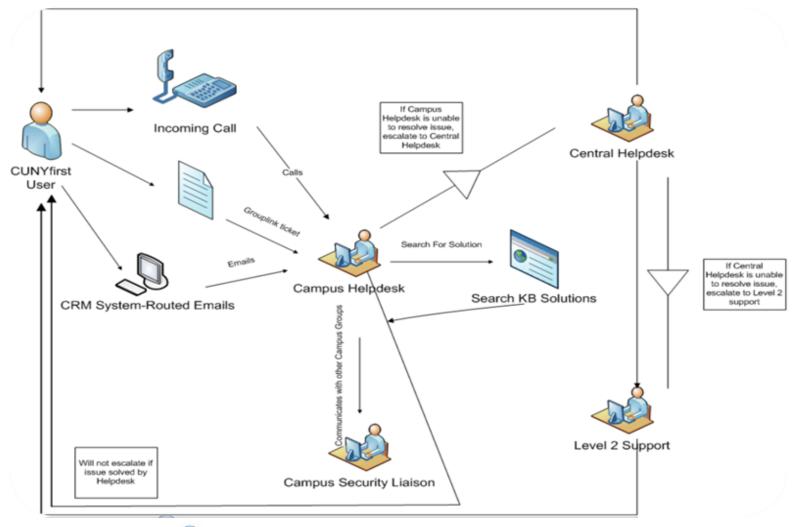
Methods To Get Support

- ➤ Peer Network Support
- ➤ Submit a Help Desk Ticket
- Submit an email to Campus CUNYfirst Helpdesk
- ➤ Phone call to Campus CUNYfirst Helpdesk
- ➤ Online Help: Universal Productivity Kit (UPK)





End User Support







Peer Network Support

- ➤ Peer Network is a group of people who have knowledge in particular areas of **CUNYfirst**
- ➤ Users are encouraged to contact their Peer Network to see if their problem(s) may be solved at this level
- ➤ Helpdesk is always available to deal with user(s) issues, but some problems may not require Helpdesk involvement
- ➤ The members of the Peer Network group will communicate with the campus Helpdesk manager in the event of any **CUNYfirst** module deployment









Questions and Answers

Suman Taneja CUNYfirst Project Director

Linda Shatzer
CUNYfirst Organizational Readiness Manager

John Ray
CUNYfirst Communications Manager





Virtual Tour







CUNYtirst Fully Integrated Resources & Services Tool



Fully Integrated Resources & Services Tod