

Mosaic Project Implementation Plans

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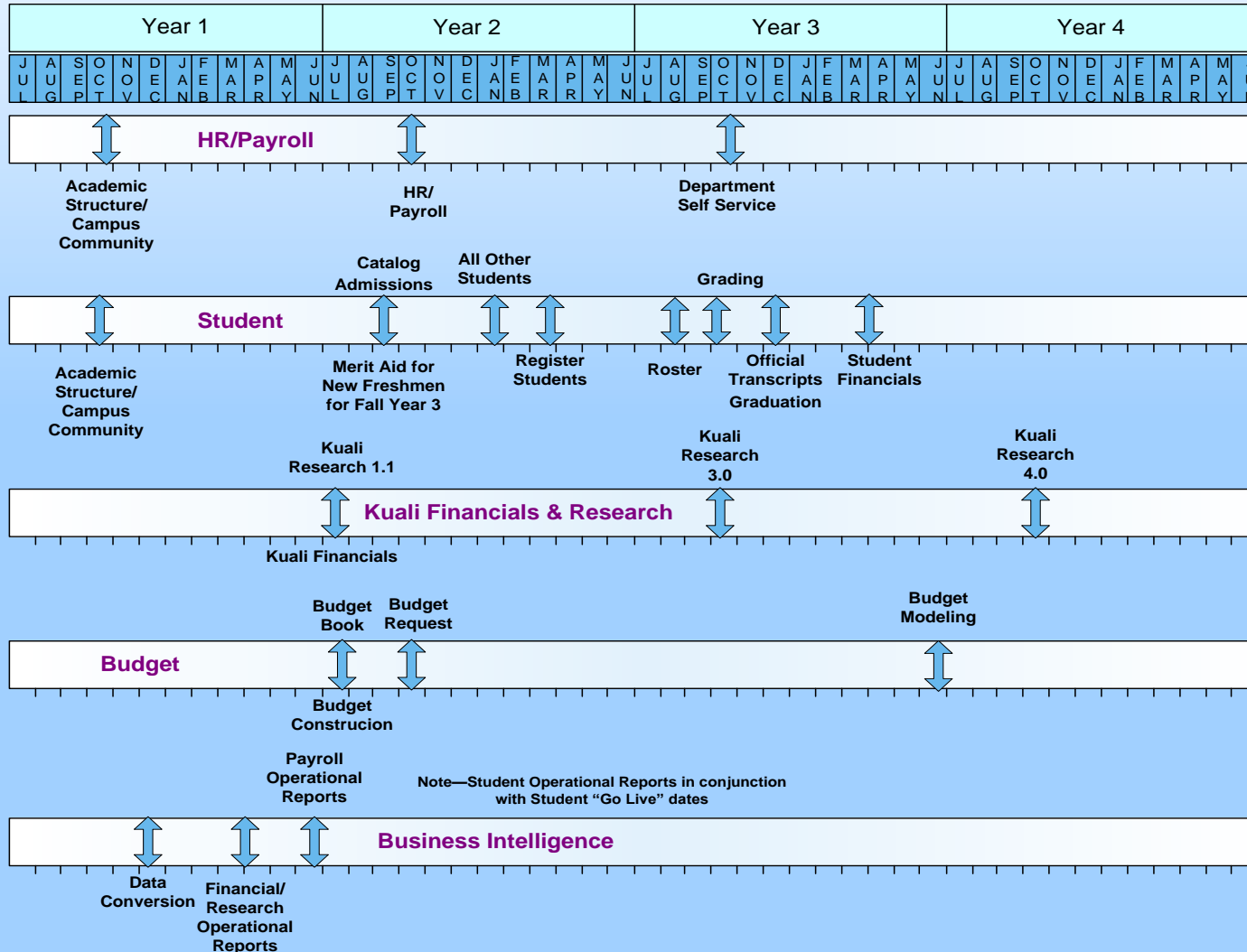
Agenda

- Getting Ready
- Overall Timeline
- Human Resources Implementation Plan
- Kualii Financial Services Implementation Plan
- Kualii Research Administration Implementation Plan
- Next Steps

Getting Ready

- Overall scope of replacement
 - Personnel System (PSOS) = Peoplesoft Human Capital Management
 - Financial System (FRS) = Quali Financial System
 - Student System (SIS+Matrix) = Peoplesoft Student
 - Grants Management (SPINS) = Quali Research Administration
 - Budget Modeling & Student Recruitment = to be defined
 - Business Intelligence
 - Infrastructure
- 3 – 5 yr. timeline
- \$80M - \$90M
- Launch in July – now August

Overall Timeline



Getting Ready

Key Success Factors

- Executive buy-in
 - ABOR approval in April 2008
 - Active Steering Committee in place
- Recognition as a University project
- No customizations
- Decision process – making & vetting
- Mostly full-time staffing
- Dedicated space
- Ability to track & reallocate budget in timely manner
 - Committed position with advisory group

Now Ready for Implementation!

Three Projects to Launch

Peoplesoft Human Resource System

Kuali Financial Services

Kuali Research Administration

Overall Timeline

Mosaic Project Schedule

Human Resources (HR)

2008						2009												
Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
		◆ Easy Pay Demo			◆ Test Pay Demo			◆ Checkpoint FS GL Interface Go/No Go?			◆ Ready for User/Parallel Test			◆ Go Live				
											<ul style="list-style-type: none"> • Data Converted • User Doc & Training • Interfaces 			<ul style="list-style-type: none"> • Workforce Admin, Postn Control • Time & Labor, Payroll • Base Benefits, Benefits Admin • Employee Self-Service 				

Financial Systems (FS)

2008						2009												
Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
		◆ Sandbox Demo Completed			◆ Kuali Financial System Rel 3.0			◆ Checkpoint Go/No Go			◆ Go Live							
											<ul style="list-style-type: none"> • Chart, GL, Fin Processing • Purchasing/AP • Capital Assets 							

Research Administration (RA)

2008						2009												
Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
◆ Kuali Coeus Rel 1.0			◆ Kuali Coeus Rel 1.1			◆ Pilot						◆ Go Live						
						<ul style="list-style-type: none"> • Budget Builder • Proposal Const. 						<ul style="list-style-type: none"> • Budget Builder • Proposal Const. 						

Peoplesoft Human Resource System

Human Resource Implementation Strategy

- **Landscape**
 - Mature software and implementation best practices
 - Extensive contract labor market
 - Used by ASU and NAU
 - Product (vs service) solutions for training, data warehouse, business intelligence, etc.
 - Extensive internal preparation
 - Several 100+ page documents outlining interfaces, processes, etc.
 - Reasonable implementation timeframe (15 months), budget, and scope
- **Strategy**
 - Utilize independent contractors
 - Bundle together 'Best of breed' expertise
 - Lower overall contract rates
 - Aggressively minimize extensions and modifications
 - Build a little – Test a little

Human Resource Key Data Points

- **\$15.8M (5 years)**
 - \$10.5M - Personnel – Full-time + Contract
 - \$5.3M - Technology – Hardware + Software – Licensing + Support
- **32+ people**
 - 20 full time
 - 12 part time
 - Shared support staff
- **12 months**
 - Aug 4, 2008 – Project Start
 - Sep 28, 2009 – System live
- **Services**
 - Workforce Administration
 - Payroll
 - Time & Labor
 - Benefits
 - Employee Self Service
 - 5 Data Marts & Accompanying Dashboards
 - Phase 2 - Manager Self-Service

Human Resource Staffing

- **Implementation Director**
 - Marcia Chatalas

- **Project Managers**
 - Priscilla Cantu (Workforce Administration)
 - 2 full time
 - 1 contractor
 - Suzanne Zimbardo (Payroll & Time/Labor)
 - 4 full time
 - 1 contractor
 - Jackie Faine (Benefits)
 - 2 full time
 - 1 contractor

- **Support**
 - Technical
 - 4 dedicated Arizona technicians
 - 1 dedicated contractor (more from Jan-Jun 2009)
 - 12 Subject Matter Experts (~4 hrs/week)
 - Shared
 - Communications
 - Training
 - Systems
 - PMO - Bookkeeping, Purchasing, etc.

Kuali Financial Services

Financial Services Implementation Strategy

- **Landscape**
 - Kuali software is new
 - Based on current software in use at Indiana University and UC Davis
 - Backed by Kuali Foundation (23 partners and commercial affiliates)
 - Strong development partners
 - UA very involved in specification and development
 - Extensive Kuali Financial Systems expertise on campus
 - Very limited vendor market
 - Colorado State (CSU) implementing in same timeframe
- **Strategy**
 - “Sandbox” environment to demonstrate product using UA data
 - Work cooperatively with CSU in implementation
 - Seek help from vendor market, understanding limitations
 - Aggressively minimize extensions and modifications
 - Build staffing plan to leverage broad campus expertise
 - Utilize fewer full-time and more part-time resources

Financial Services Key Data Points

- **\$5.6M (5 years)**
 - \$4.7M – Personal Services – Full-time + Contract
 - \$0.9M - Technology – Hardware + Software – Licensing + Support
- **45+ people**
 - 19 - 6 full time functional + 13 full time technical
 - 26 part time
 - Shared support staff
- **11 months**
 - August 11, 2008 – Project Start
 - July 13, 2009 – System live
- **Services**
 - General Ledger
 - Chart of Accounts
 - Financial Processing
 - Purchasing/Accounts Payable
 - Capital Assets
 - Phase 2 – Accounts Receivable, Budget Construction, Effort Certification

Financial Services Staffing

- **Implementation Director**
 - Kymber Horn

- **Project Managers**
 - Johanna Valdez (GL, Chart, Fin Processing)
 - 1 full time
 - Cecilia Esguerra - tentative (Purchasing/AP, Capital Assets)
 - 2 full time

- **Support**
 - Technical
 - 13 dedicated Arizona technicians (existing + new hires)
 - 3 dedicated contractors
 - 26 Subject Matter Experts (~4-6 hrs/week)
 - Shared
 - Communications
 - Training
 - Systems
 - PMO - Bookkeeping, Purchasing, etc.

Kuali Research Administration

Research Administration Implementation Strategy

- **Landscape**
 - Very specialized software niche
 - Kualii software is new
 - Based on Coeus software in use at MIT and other institutions
 - Backed by Kualii Foundation
 - UA very involved in specification and development
 - Current UA system is largely paper-based for Pre-Award
 - Kualii Foundation plans to release enhancements for several years
 - Superior Research Administration software could provide Arizona with some competitive advantage
- **Strategy**
 - Pilot implementation in Chemistry, Medicine
 - Work cooperatively with other institutions if possible
 - Plan to treat Research Administration software as an investment, not a cost
 - Lower barrier to approve system change requests

Research Administration Key Data Points

- **\$2.2M (5 years)**
 - \$1.5M – Personnel – Full-time + Contract
 - \$0.7M - Technology – Hardware + Software – Licensing + Support
- **5+ people**
 - 5 full time
 - ?? part time
 - Shared support staff
- **12 months**
 - August 2008 – Project Start
 - Fall 2008 – Pilot project live
 - Summer 2009 – Proposals and grants live
- **Services**
 - Budget Builder
 - Proposal Construction
 - Phase 2 – Post-Award processing

Research Administration Staffing

- **Implementation Director**
 - Paul Sandoval

- **Project Managers**
 - Rhonda Dwyer
 - 1 contributor

- **Support**
 - Technical
 - 2 dedicated Arizona technicians
 - Approximately 20 Subject Matter Experts (~4-6 hrs/week)
 - Shared
 - Communications
 - Training
 - Systems
 - PMO - Bookkeeping, Purchasing, etc.

Next Steps

- Permission to proceed from Board Technology Oversight Committee
- Finalize space arrangements
- Build out of project teams
- Training
- Request for proposals issued
 - Including one for hosting solutions
- Prepare next set of implementation plans
- Engage ABOR consultant

Interesting Development...

Exploring UA-ASU support model

Questions?



Project Structure

