



rSmart Kuali Proof of Concept (POC)

June 16, 2009

Presenters



- ▶ **Chuck Kensicki, Senior Quali Financial Consultant, rSmart**
 - ▶ Mr. Kensicki has over twenty five years of professional and progressive experience in Higher Education, including Project Management, quality assurance, system's analysis, programming, database management, web applications, workflow applications, enterprise financial systems, document management and imaging and data warehousing, with twenty three years in IT management at California State University Chancellor's Office in charge of Financial, Plant Maintenance, and ERP applications for the twenty three campuses.



- ▶ **Mike Zackrison, VP of Marketing and Strategy, rSmart**
 - ▶ Prior to joining rSmart, Mike was vice president of product management for Unicon, Inc., where he launched open source support offerings and established key marketing partnerships with Oracle Corp. and Zimbra. While working for what is now SunGard Higher Education he was a member of the original Campus Pipeline business team that conceptualized and launched the SCT Luminis product line, now the leading enterprise portal solution in higher education.

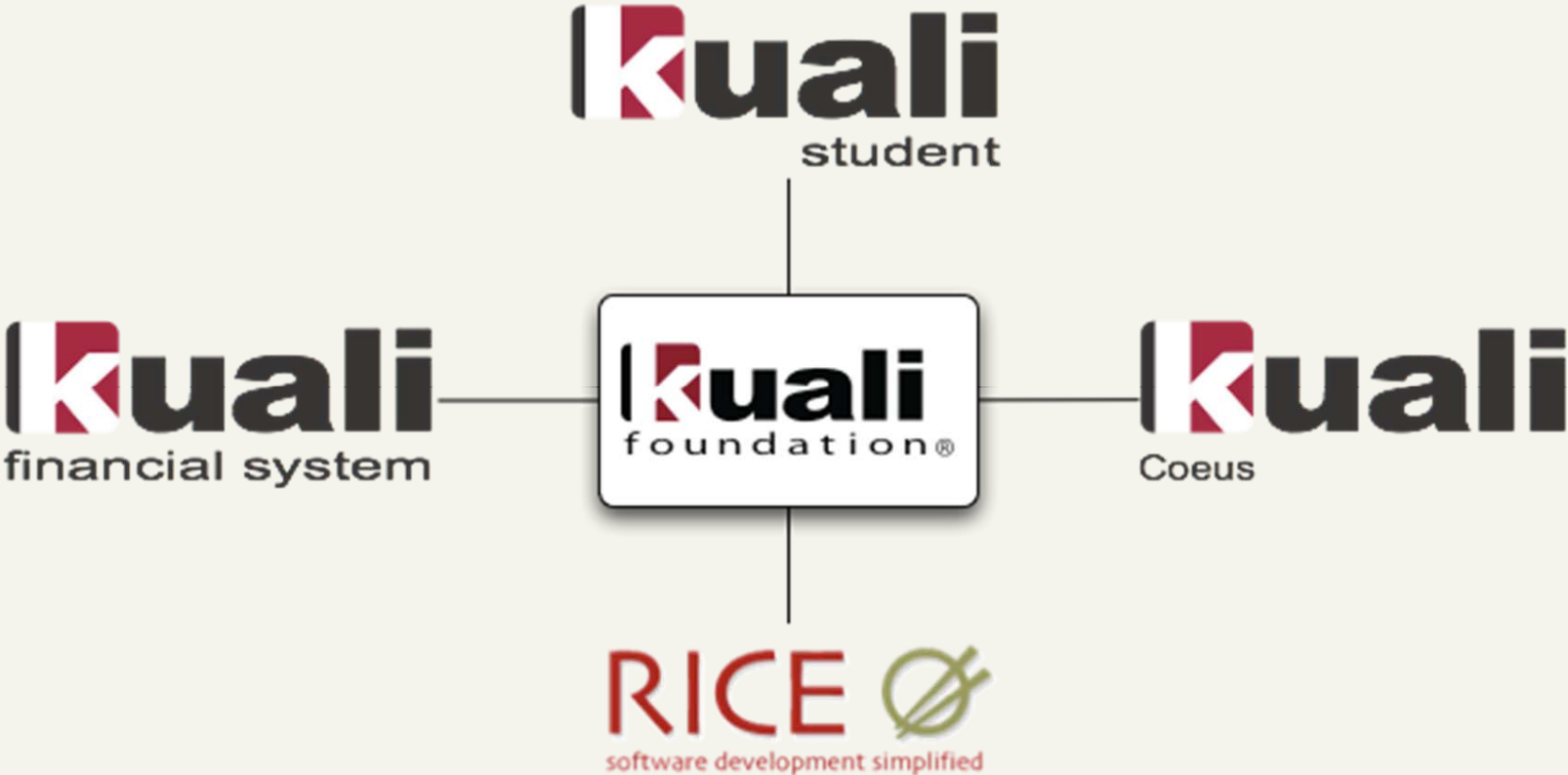
rSmart Quali POC agenda

- ▶ Quali Foundation, Quali Financial System (KFS) and rSmart
- ▶ Why a POC and not a RFP
- ▶ Proof of Concept Approach
- ▶ Why rSmart
- ▶ Q & A

The Kualu Foundation, KFS and rSmart

- ▶ The Kualu Foundation
 - ▶ Provides the organization, infrastructure, and governance to effectively produce high quality enterprise software
- ▶ The Kualu Financial System (KFS)
 - ▶ Comprehensive financial management system designed by and for education
- ▶ rSmart: Supporting Open Software for Education
 - ▶ Founded to provide the needed support to compliment this next generation development model

www.kuali.org



The Kualifoundation

- ▶ Non-profit organization with various responsibilities:
 - ▶ Sustaining the Kualifoundation communities
 - ▶ Providing on-going governance
 - ▶ Coordinating partner efforts
 - ▶ Managing and protecting intellectual property rights
 - ▶ Conference planning
 - ▶ Educating and assisting members of the Kualifoundation community

Origins of Kuali

- ▶ The Kuali project started some 5 years ago when Indiana University, NACUBO and rSmart joined forces to advance the open source model in higher education to satisfy several objectives...

Why Kualii?

- ▶ Streamline operations with solutions for education designed by education
- ▶ Reduce costs associated with software fees and non-functional upgrades (lower total cost of ownership)
- ▶ Eliminate risk of software vendor's decision to terminate a product line, or to sell it
- ▶ Create a sustainable community where members own, develop, enhance and work together to overcome common challenges
- ▶ To gain greater control over the level of innovation educational institutions can provide to constituents

Sample of Kualii Institutions

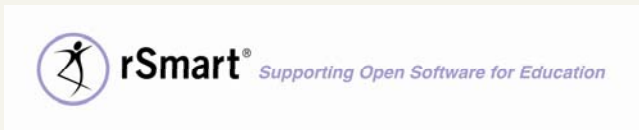
INDIANA UNIVERSITY



THE UNIVERSITY OF ARIZONA
TUCSON ARIZONA



MICHIGAN STATE
UNIVERSITY



WHY A POC?



Why a POC and not a RFP

- ▶ The best way to evaluate the fit of open-source software, is to try it
- ▶ The RFP is an artifact of the old way of doing a business when highly protected proprietary software was your only option
- ▶ There are no barriers to trying open source software, and commercial support options do exist

What is the purpose of the RFP process?

- ▶ Determining functional fit
- ▶ Determining technical fit
- ▶ Establishing business requirements
- ▶ Engagement of stakeholders
- ▶ Reducing Risk

How effective are the two approaches?

rSmart POC		vs.	RFP	
Goal	Letter Grade		Goal	Letter Grade
Technical Fit	A		Technical Fit	C
Functional Fit	A		Functional Fit	D
Business Requirements	A		Business Requirements	C
Engaging Stakeholders	A		Engaging Stakeholders	D
Reducing Risk	A		Reducing Risk	D
GPA	4.0		GPA	1.75

POC



- Use electronic workflow
- Initiate financial transactions
 - Verify balances
 - Engage Stakeholders

RFP



- Glimpse of functionality
- Boilerplate responses
- Promises

Benefits of a POC?

- ▶ Engages campus stakeholders to create early buy-in and uncommon knowledge and awareness of how KFS fits
- ▶ Enables thorough evaluation using a KFS environment with familiar accounts and data
- ▶ Reduces costs by taking incremental and predictable steps through evaluation and implementation
- ▶ Migration tools developed during POC are reusable

Who has done an rSmart POC?

- ▶ University of Arizona
- ▶ Colorado State University
- ▶ San Joaquin Delta Community College
- ▶ Naval Postgraduate School
- ▶ Research Foundation of CUNY
- ▶ University of Connecticut
- ▶ University of Hawaii system (10 campuses)

POC options with rSmart?

- ▶ rSmart can offer whatever level of evaluation you need:
 - ▶ Some less complex institutions have chosen to engage rSmart to focus on the GL and only required the manual entry of a subset of accounts
 - ▶ Other institutions preferred to import a larger subset of accounts, as well as vendor data to explore purchasing and accounts payable
 - ▶ Some more complex institutions have engaged rSmart to write scripts to migrate all legacy GL, AP, Purchasing data to KFS
 - ▶ All engagements leverage rSmart's unequal understanding of the many parameters settings for optimum performance

POC Project Definition, Scope and Approach



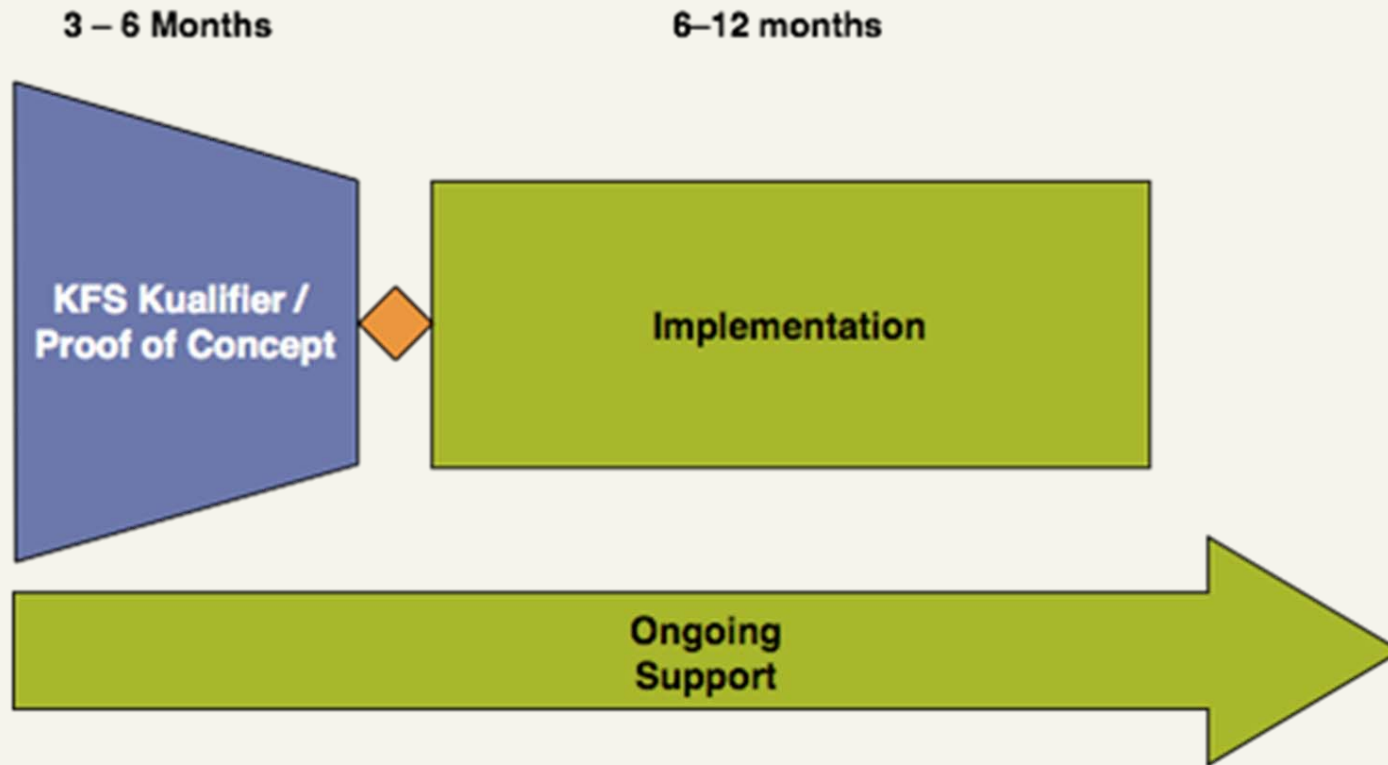
Project Definition

- ▶ Initiate COA maintenance eDocs
- ▶ Initiate Financial transaction eDocs
- ▶ Inquire legacy fund balances from GL inquiries
- ▶ Set up parameters
- ▶ Set up workflow rules
- ▶ Add members to roles

Project Definition (cont.)

- ▶ Initiate a requisition
- ▶ Complete a purchase order
- ▶ Create a payment request
- ▶ Enter a credit memo
- ▶ Evaluate the high level schedule and resource requirements for the full KFS implementation

KFS Proof of Concept Approach



The KFS Proof of Concept scope

- ▶ Project Initiation
- ▶ Assessment & High Level Fit Gap
- ▶ Software initialization
- ▶ Conversion Strategy
- ▶ Configuration and Conversion
- ▶ Hands on Evaluation Training
- ▶ Develop Implementation Project Plan
- ▶ Support

Project Initiation

- ▶ An experienced rSmart project manager will kick off the project and ensure a high standard of performance throughout the project.
- ▶ Initial project plan
- ▶ Agenda and schedule for Site Visit

Assessment & High Level Fit Analysis

- ▶ Gather financial system information and information about the current technical architecture.
- ▶ Review financial statements, annual reports, current required financial reports, and organizational structure.
- ▶ Assessment report that includes:
 - ▶ Summary of findings
 - ▶ Implementation options
 - ▶ High-level fit-gap
 - ▶ Recommendations

Software Initialization

- ▶ Install and configure KFS. Installation decisions will be based on the responses to the technical survey completed by campus IT stakeholders
 - ▶ Load bootstrap data
 - ▶ Load demo instance with demo data
 - ▶ Deliver a hosted implementation of KFS ready for rSmart technical consultants to configure and load
 - ▶ Deliver a hosted demo instance of KFS ready for site visit and campus stakeholders.

Conversion Strategy

- ▶ Finalize organizational structure (Client)
- ▶ Finalize the summary logic of Account Numbers, Object Codes, Levels, and
- ▶ Consolidations (Client)
- ▶ Provide sample Specific Object Codes (rSmart)
- ▶ Provide Specific Object Codes (Client)
- ▶ Assign KFS numbers to Accounts (Client)

Conversion Strategy (cont.)

- ▶ Identify 50 Accounts to be set up (Client). These accounts should represent different organizations and the different types of financial activities.
- ▶ Determine Attributes for each of 50 Accounts (Client)
- ▶ Review related reference tables, charts & organizations, users & groups, and chart of accounts tables and determine which tables to load. (rSmart)
- ▶ Completed Design Specifications

Configuration and Conversion

- ▶ Load COA spreadsheet into KFS
- ▶ Load user master spreadsheet into KFS
- ▶ Load sample accounts into KFS
- ▶ Load beginning balances into KFS
- ▶ Load budgets into KFS
- ▶ Develop a workflow for each account in KFS
- ▶ User acceptance testing
- ▶ Configured software loaded with basic institutional data

PURAP

- ▶ Gather required institution-specific parameters and data
- ▶ Enter PURAP configuration parameters
- ▶ Enter sample data into reference tables
- ▶ Set up sample vendors and buildings
- ▶ Set up sample PURAP users
- ▶ PURAP module configured for evaluation with limited institutional data

Hands on Evaluation Training

- ▶ Customize training materials using client data
- ▶ Review KFS configuration
- ▶ Conduct maintenance eDoc training
- ▶ Conduct Financial Transaction eDoc training
- ▶ Conduct GL Inquiry training
- ▶ Conduct PURAP eDoc training

Develop Implementation Project Plan (optional)

- ▶ Conduct planning workshop
- ▶ Develop projected implementation scenario
- ▶ Develop preliminary high level project plans (*project charter*)
- ▶ Develop Staffing plans and resource allocation plans
- ▶ Identify risks and mitigation plans
- ▶ Develop work breakdown structure (*WBS*)
- ▶ Assign resources and durations
- ▶ Review project plan with client

Develop Implementation Project Plan (cont.)

- ▶ Project Charter
 - ▶ Project objectives
 - ▶ Scope and approach
 - ▶ Critical success factors
 - ▶ Constraints
 - ▶ Assumptions
 - ▶ Risks
 - ▶ Project organization
- ▶ Project Plan
 - ▶ Tasks
 - ▶ Dependencies
 - ▶ Resources
 - ▶ Durations

Support

- ▶ rSmart provides comprehensive functional and technical support throughout the project and offers ongoing support options beyond the completion of the project.
 - ▶ Set up new support account
 - ▶ Provide an introduction to rSmart support services training.
 - ▶ Support portal login information

Proof of Concept Timeline



Getting started with Kuali Financials

- ▶ “Kualifier” Proof of Concept Package

- ▶ Includes:

- ▶ **Services and Training**

- ▶ Onsite evaluation planning
 - ▶ Kuali Financial System (KFS) overview and training –or – Kuali Workflow overview and training
 - ▶ Enhanced software set up and customization
 - ▶ Chart of account conversion prototyping
 - ▶ Custom evaluation environment offering a continuum: from simple manual data entry and focus on COA, to complete data migration through creation of reusable scripts, including COA, GL, PURAP

- ▶ **Software Support**

- ▶ Hosted*
 - ▶ Full open source stack
 - ▶ Latest Kuali release
 - ▶ Report generation tools
 - ▶ Three to six months standard support

*Can be deployed onsite if preferred on an included hardware appliance



Why rSmart?



Why work with rSmart?

- ▶ rSmart is the only partner with experience implementing the Quali Financial System
- ▶ rSmart assists with evaluating and planning implementations. rSmart can augment teams with talented and experienced professionals who know Quali
- ▶ Works closely with institutions to implement Quali, providing help as needed with management, functional and technical expertise, and conversion tools
- ▶ rSmart provides ongoing application management and support to keep Quali performing it's best

Why work with rSmart? (cont.)

- ▶ rSmart packages, certifies, implements, services, and provides commercial-level support for Quali and Sakai
- ▶ Depth of application knowledge, community engagement and experience with more Sakai and Quali customers than any other firm
- ▶ rSmart was founded to overcome the historical risks associated with open source software: lack of support, the need for on-staff developers



rSmart®

**Kuali Founder
Foundation member
Board member
Functional council
Technical council
Architecture
Development
Documentation**

kuali
commercial affiliate ®

rSmart Services

- ▶ Implementation
- ▶ Configuration
- ▶ Customization
- ▶ Integration
- ▶ Training
- ▶ Consulting
- ▶ Hosting
- ▶ Support
- ▶ Maintenance
- ▶ Bug fixes
- ▶ Documentation
- ▶ Issue resolution
- ▶ Custom Development



Questions and Contact

KUALI COMPREHENSIVE ENTERPRISE FINANCE SOLUTION



- ▶ Scales across all institution levels
- ▶ Built by education, for education
- ▶ Modular by design
- ▶ Comprehensive service and support

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www.rsmart.com

Don't miss:

NACUBO

Meet rSmart and IBM at Fenway Park, Boston
June 28, 2009

Campus Technology Conference

Boston, MA
July 27 - 30, 2009

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