



# INTRODUCE

Kuali

rSmart

San Joaquin Delta College



## INTRODUCING KUALI

On August 30, 2004, four organizations announced their intent to build an open source financial system for higher education. Indiana University, the University of Hawaii, and rSmart began to create the Kuali Financial System, with guidance from NACUBO. The group used Indiana's home grown system to accelerate development. Five years later, the Kuali community includes over 30 institutions and a range of commercial affiliates. The opportunity to work together creating a system that meets the unique needs of higher education has proven exciting and rewarding.

With the Kuali Financial System in use at several institutions, the community continues to develop a full suite of enterprise administrative applications. Currently in development, Kuali Coeus provides a research administration system and Kuali Student is student administration system. Kuali Rice is a middleware suite that is leveraged by the other Kuali projects. Several additional applications are on the horizon.

The organization of the Kuali projects emphasizes:

**Leadership by functional experts**

*A council of functional experts from member institutions defines and prioritizes functionality*

**Collaboration across organizations**

*Member institutions share resources as well as unique skills and areas of excellence*

**Effective management**

*The Kuali community emphasizes effective, transparent project oversight and management, using resources that are dedicated to the Kuali projects by investing partner organizations*

**A strong and diverse ecosystem**

*The Kuali commercial affiliates help higher education institutions evaluate, implement and support Kuali solutions*



**Our role is to create the opportunity for institutions of all types and sizes to successfully use these valuable new systems, and to ensure that the community grows and benefits from the experience of each new adoption.**



— Chris Coppola  
rSmart CEO and co-founder

## INTRODUCING RSMART

rSmart focuses entirely on supporting open source software for education. The company has fully embraced the new model for educational technology - open, collaborative development of software by colleges and universities. rSmart supports institutions of all profiles to become effective consumers of open source software by packaging, certifying, deploying and supporting the Kualo Enterprise Suite for colleges and universities, as well as the Sakai Collaboration and Learning Environment.

rSmart is the only founding commercial participant in the Kualo community and was among the first organizations elected to the Sakai Foundation's board of directors. rSmart has developed a reputation as the model for commercial participation in these communities by contributing time and expertise to the functional specifications, software development, organizational development, and governance. rSmart employees play critical community roles in governance and setting functional direction, as well as contributing to architecture and software development.

How does rSmart support Kualo institutions?

- **Specialized expertise**  
The rSmart team has an in-depth understanding of the Kualo Financial System as a result of participating in the design, development, implementation and support of the system
- **Reliable resources**  
rSmart brings a highly-skilled team that can supplement staff or skill gaps at an institution, providing significant flexibility while reducing implementation risk
- **Breadth of experience**  
rSmart provides a wide range of experience from participating in nearly twenty Kualo Financial System evaluation and implementation projects
- **Proven tools and processes**  
rSmart has developed a variety of evaluation, conversion, planning and configuration tools that ease an institution's transition to the Kualo Financial System

rSmart is committed to the success of every institution that implements Kualo. Every success and every lesson learned strengthens the community and provides knowledge and tools to those yet to implement the Kualo Financial System.



## INTRODUCING SAN JOAQUIN DELTA COLLEGE

San Joaquin Delta College is part of the California Community Colleges System, the largest system of higher education in the world. Located in Stockton, California, Delta College provides educational services to more than 20,000 students from diverse backgrounds through continuing, transfer, career and technical education. Delta College is an award-winning technological innovation leader in the California education community.

Dr. Raúl Rodríguez joined Delta College as President in Fall 2002. Under Dr. Rodríguez, a bond for \$250 million was passed in 2004. The bond will be used to upgrade and expand the Stockton campus and expand and establish Education Centers in Delta College's region, which is comprised of San Joaquin County and portions of Alameda, Amador, Calaveras, Sacramento and Solano Counties.

### **San Joaquin Delta College**

Location: Stockton, California

Student Population: Approx. 20,000

Finance System

**Kuali Financial System**

Migrated From

**Oracle Finance**

Student System

**System 2000 (home grown)**

Human Resource System

**Munis**

Learning Management System

**Sakai**



# COLLABORATE

## THE KUALI COMMUNITY

Any institution can download and use the Kuali software independently. However, one significant benefit offered to those who implement the Kuali Financial System is a community of higher education institutions committed to one another's success.

There are many different models for engaging with the community. Some institutions derive direct value from using Kuali applications. They seek lower total cost of ownership and the functional benefits of using software created by the user community. Other institutions engage in the community to direct and to produce the future capability of Kuali applications. These institutions gain greater control of their destiny, opportunities to learn from and to collaborate with peers, and the chance to provide great benefit to all of higher education.

The Kuali community benefits from participation and contributions of all sorts. The strength of the community results from diverse individuals and organizations coming together for the benefit of all.



## COLLABORATE SAN JOAQUIN DELTA COLLEGE

Delta College was one of a group of institutions commissioned by the Foundation for California Community Colleges to evaluate enterprise resource planning systems to determine which might best meet their needs. After extensive research and assessment, Delta College determined that there was no single application that addressed their spectrum of needs, especially those needs specific to higher education.

Dr. Raúl Rodríguez, President of San Joaquin Delta College, continued researching options and while attending a conference, he learned about the Kualí Financial System. Dr. Rodríguez was initially drawn to Kualí because it offers institutional control, as opposed to ERP vendor control. “As a community college,” Dr. Rodríguez explains, “we must comply with significant regulations, often more so than a university. Our experience has been that while vendors would like, in theory, to accommodate our needs, often we are not a priority and we do not have a significant voice in the application development. With Kualí, we not only have a voice, but we are also designers and architects. We work with leading institutions, not as partners in name only, but as full partners in development.”

Intrigued by the concept of open source and the fact that Kualí is built by educators, for educators, Dr. Rodríguez asked his campus to research the feasibility and opportunities of the Kualí Financial System. A functional assessment team from Delta College traveled to Indiana University to observe and learn from a founding community member. This experience seeded Delta College's commitment to invest in the Kualí products and community.

As an investing member of the community, Delta College employees are actively engaged in the Kualí community. In total, Delta College has dedicated approximately five full-time equivalent resources to the community over the past five years.

Through the course of Delta College's implementation, the college was able to benefit from community resources and collaboration. More importantly, the Delta College staff shared its understanding of unique community college needs and requirements to ensure that the system meets the needs of all community colleges.



## Community Resource Contribution

Technical Resources	Functional Resources
<p><b>Chris Kirschenman</b>, a java programmer and development manager, spent 60 months developing and testing the Kualu Financial System code and Rice middleware features.</p> <p><b>David Elvea</b>, a java programmer and Rice expert, spent 48 months developing Rice features and baseline code.</p> <p>Two contracted java programmers spent a total of 60 months developing and testing the Kualu Financial System code.</p>	<p><b>Lee Belarmino</b>, Vice President of Information Technology, serves on the Kualu Foundation's Board of Directors</p> <p><b>Claire Tyson</b>, Director of Finance through 2008, served on the Kualu Financial System Board</p> <p><b>Jon C. Stephens</b>, Vice President of Business Services, serves on the the Kualu Financial System Board</p>
<p><b>Benefit:</b></p> <ul style="list-style-type: none"> <li>• Hands on expertise that can be shared across campus</li> <li>• Strength of working relationships developed face-to-face</li> </ul>	<p><b>Benefit:</b></p> <ul style="list-style-type: none"> <li>• Collaborate to address community needs, while assuring that specific Delta College needs are also addressed</li> </ul>
<p><b>Recommendations:</b></p> <p>"We saw great benefit as our programmers contributed to the project and brought back that experience to our campus. Invest resources in the community. The payback in new skills, expertise and relationships is well worth the investment."</p> <p>Matt Coombs, Senior Director of Systems Development</p>	<p><b>Recommendations:</b></p> <p>"Empower your employees to become subject matter experts within the Kualu community, and you will be amazed at the result. Your employees will feel valued, they will be motivated to learn and to share what they learn, and they will bring a wealth of knowledge to your campus from their participation in the community."</p> <p>Lee Belarmino, Chief Information Officer</p>



## COLLABORATE RSMART

Over a five-year period, rSmart has assisted nearly a hundred institutions to investigate and understand Kualu products and to engage in the Kualu community. While every institution's experience is different, there are two common paths.

Many institutions begin their investigation of Kualu by engaging in the community. They first find philosophical alignment; they appreciate the community source approach and find commonality in institutional priorities with Kualu partners. The next step is to evaluate the software's ability to meet institutional needs. rSmart is able to help by providing a Proof of Concept experience for these institutions.

Other institutions have come to the Kualu community by another route. These institutions find themselves faced with a strategic imperative to improve research management or to distribute financial decision-making. These institutions learn

of the Kualu Financial System and seek to understand the community development model as it compares to the traditional vendor model. They seek to evaluate benefits and risks, and to define the right level of community engagement for the institution. rSmart is able to assist an institution to better understand the Kualu community source model and to create an approach to engage with the community that matches an institution's unique situation, resources and goals.



# EVALUATE

## THE RIGHT FIT

Most enterprise system implementations begin with an RFP. Users and technical experts ask vendors whether the system will meet each requirement, and vendors provide a series of documents and demos intended to answer the questions. Only after implementation are users able to gain hands-on access to the system.

Kuali's open approach provides a better way to evaluate fit for your institution. Institutions can use the software without making commitments and without a restrictive proprietary license. Users can initiate and complete transactions in the system using their own data as part of the initial evaluation process. Technical experts can evaluate code and peruse the list of known issues with the software. Institutions can review both the completed functionality and the roadmap of future capabilities.

This openness and transparency creates unprecedented opportunity to engage the campus community in evaluating and selecting the system, creating buy-in that provides benefit throughout the implementation.

## Institutions that have completed the Proof of Concept report that they have:

- Gained important experience with the system
- Proven data conversion processes
- Engaged stakeholders through evaluation of a working system with meaningful data
- Gained important information about the implementation approach

## EVALUATE RSMART

rSmart is helping to create a community of schools that learn from one another in the evaluation and implementation process. The Proof of Concept is an important component of this learning and sharing.

The Proof of Concept allows institutions to use a hosted instance of the Kualu Financial System that is loaded with institutional data and accounts. Users complete a variety of transactions, allowing them to assess functionality, usability and fit with institutional processes. The Proof of Concept is a low-risk way to thoroughly evaluate the system and engage campus stakeholders in a way that is not possible with a traditional RFP. For those beginning their implementation, the Proof of Concept is an important initial stage of the project. Taking the time to complete a Proof of Concept reduces risk.

The rSmart team supports the Proof of Concept, drawing from deep experience with the Kualu Financial System and broad experience with the majority of implementing institutions. This allows the rSmart team to provide a hosted instance of the Kualu Financial System, complete a high-level fit/gap analysis, create a data conversion strategy, load legacy data in the system, and provide user training. rSmart also provides support for the system and users throughout this process.

What transactions can stakeholders complete with the Proof of Concept?

- Initiate chart of accounts maintenance eDocs
- Initiate financial transaction eDocs
- Inquire legacy fund balances from general ledger inquiries
- Use workflow to route and approve documents
- Initiate a requisition
- Complete a purchase order
- Create a payment request
- Enter a credit memo



# ENGAGE

## THE CAMPUS COMMUNITY

There is not a large software vendor marketing the Kualii Financial System. Therefore, the process for learning about Kualii and building support for the system among key stakeholders is unique.

On most campuses that have adopted the Kualii Financial System, one individual or a small group has heard about Kualii and has become intrigued. This often leads institutional representatives to attend Kualii Days, or to visit with a peer institution that is engaged in the project, to learn more.

The process to transition from few champions to broad support is critical to a successful implementation.



## ENGAGE

### SAN JOAQUIN DELTA COLLEGE

Originally, the idea of considering an open source financial system was brought to campus by Dr. Raúl Rodríguez, president of San Joaquin Delta College. Executive support to investigate and potentially to implement the Kualí Financial System was critical, but Delta College knew it also needed to build institutional support across campus.

One strategy for gaining institutional support for a new financial system involved reaching out to understand how the campus community viewed the existing financial services and structure. The finance organization surveyed campus staff to determine their level of satisfaction with the existing financial system and processes. The surveys also sought to understand what financial system features and processes needed improvement and to determine the ability and willingness of administrative users to move to a new model. With the survey results informing the path ahead, Delta was confident in its choice to implement the Kualí Financial System.

Delta College feels that the campus community has embraced the Kualí Financial System for a number of reasons. First, the project team that Delta College convened was able to visit Indiana University, where team members were able to witness the functionality of the system, as well as the decentralized model that the Kualí Financial System facilitates. Team members were impressed by the system's functionality and saw benefit in the decentralized model. Dr. Jon C. Stephens, Vice President of Business Services, explains the benefit: "Employees have felt empowered, because decision-making has been pushed down through the organizational structure. This high level of empowerment fostered broad institutional support for the Kualí Financial System."

Staff members at Delta College have also appreciated the opportunity to enhance their functional expertise as they have learned new systems and processes. Subject matter experts



are able to collaborate with peers in a way that they find exciting and stimulating as they provide input on the Kualu Financial System development and processes. In the words of Dr. Stephens, "Kualu has brought a great deal of excitement to our campus, and it is infectious."

## Keys to Success

**The Delta College project sponsors offer the following recommendations to other executive sponsors**

- 1. Encourage staff members to fill leadership roles in the community**
- 2. Assess campus perceptions of current service levels to inform future plans and create the case for change**
- 3. Partner closely with a commercial affiliate that has deep experience with the Kualu Financial System**
- 4. Send staff members to Kualu Days to increase benefit from the community**

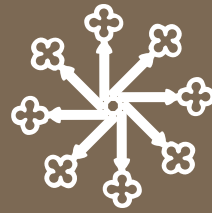


## ENGAGE RSMART

A successful implementation requires support at all levels of your institution. The rSmart team has the knowledge and expertise to act as a valuable resource in your efforts to gain institutional support. Since the inception of Kualī, rSmart has worked with institutions of all sizes and profiles to help key individuals understand Kualī and then to devise strategies to educate and engage the campus.

The rSmart team has the experience to assist you in building support for Kualī with your stakeholders across campus.

While effectuating institutional support is not a formal service that rSmart offers, company executives will work with you to evaluate a variety of approaches to build sponsorship and support, and connect you with other community resources who can assist you as well.



### Sample rSmart Quali Consultants

<p><b>Chuck Kensicki,</b> Senior Consultant</p> <p>Brings experience as the leader of business system implementations for the 23 campuses of the California State University System.</p> <p>Provides in-depth understanding of business system implementations and ability to effectively engage all stakeholders.</p>	<p><b>David Lyon,</b> Senior Consultant</p> <p>Brings experience as a Senior NACUBO Fellow. Recipient of a NACUBO Distinguished Business Officer Award.</p> <p>Provides expertise matching the capabilities of the Quali Financial System to your institution's strategic goals.</p>
<p><b>Keiko Takahashi,</b> Senior Consultant</p> <p>Brings over 20 years of experience supporting financial systems in higher education.</p> <p>Provides the critical ability to work across technical and functional teams to define, plan and execute projects.</p>	<p><b>Sharon Antonucci,</b> Senior Project Manager</p> <p>Brings experience across a breadth of technical, functional, project and communications roles.</p> <p>Provides insight into communication strategies for Quali planning and implementation at a wide range of institutions.</p>



# SELECT

## THE RIGHT SYSTEM

The model for evaluating and implementing the Kualu Financial System is different from other enterprise systems. Institutions that choose the Kualu Financial System often have several commonalities.

Most are seeking to:

- Distribute access to financial data for decision-making
- Support complex research accounting and reporting
- Achieve greater control over enterprise systems
- Use a system that meets higher education's unique needs
- Contribute to the broader higher education community

How do you know if this system and approach are right for your institution?



## SELECT SAN JOAQUIN DELTA COLLEGE

Prior to implementing Kuali, San Joaquin Delta College was using an older version of a proprietary financial system that users found outdated and cumbersome. For a number of reasons, Delta College was using the old financial system “as is” and patching as needed rather than upgrading the system. Over the years, Delta College had realized that it required customization capabilities that its old system did not offer or that were very difficult to achieve. Even simple changes required hard coding that was complex and time consuming for their in-house technology staff. As a result, Delta could not access and compile data in a manner that supported effective budgeting, reporting and decision-making.

Realizing their legacy finance system was not operating effectively with perpetual patches, Delta began a gap analysis of alternative financial systems. Delta found that all the systems, even the systems of the “big players,” did not adequately

address the way Delta does business. The gap between Delta’s needs and what vended solutions could provide was significant. Additionally, the price estimates for fully integrated student and financial systems ranged from \$5 million to \$12 million.

Delta thought it would have to build its own homegrown system and began some initial modeling. Then, Delta learned about the Kuali Financial System. As an initial step in determining whether Kuali would work for Delta, Delta sent a team of users to Indiana University, where the basic framework of Kuali originated. At Indiana University, Delta’s team members were able to examine the relevant business processes and assess the similarities and differences in how they do business. Upon returning to Delta College, the functional assessment team informed the campus that it believed the Kuali Financial System was a viable solution for Delta.



**“Our objective is to change our culture to support empowered, distributed management of budgets and spending. The Kuali Financial System is central to enable this change.”**



—Dr. Jon C. Stephens  
Vice President of Business Services

While working with IU, Delta's team was able to observe Indiana's decentralized financial structure. Dr. Jon C. Stephens, Vice President of Business Services for Delta College, shared the vision of a highly decentralized financial structure. Dr. Stephens explains, “With our old system, our central financial office was required to make educated guesses about how budgets should be allocated within different institutional organizations—organizations for which the central office may or may not have had a clear understanding of financial priorities and needs. With the Kuali Financial System, the assumption is that those managing a budget are the most knowledgeable about how the money should be spent. Therefore, beyond fixed costs such as employee salaries, the budget manager is empowered to allocate budget funds.”

The efficiencies afforded by the decentralized model are numerous. Many business decisions

are turned around quickly because they do not need to be sent to the central finance department. The process is also very transparent throughout, so there is never a question of where a purchase order might be or whether approval has been given on a potential expense. This information can be quickly and easily accessed.

Without question, the efficiencies made possible through decentralization were strong motivators, but there were additional considerations. Delta College had struggled for years to fit institutional needs to an inflexible system, but the college is configuring the Kuali Financial System to match needs. With configurations, Delta is able to match how data is recorded, generated, and accessed to actual business processes and reporting needs. The system cleanly matches institutional needs, simplifies previously cumbersome tasks, and gives access to data vital to quality decision-making.



# PLAN

## FOR SUCCESS

While planning for a Kualiti implementation is not necessarily different than planning for the implementation of proprietary enterprise software, there are a few unique advantages. Some institutions choose to leverage community experiences and tools. Institutions also benefit from involving stakeholders in the Proof of Concept experience to create a common view of the implementation plans and needs. Both of these efforts provide unique benefits in planning for a successful implementation.

Institutions are using two different approaches for implementation project management: leveraging internal project managers who partner with consultants with deep Kualiti expertise, or contracting project management resources from companies like rSmart. Both approaches are achieving strong results when the project managers develop sufficient understanding of the Kualiti Financial System and the community.



## PLAN

### SAN JOAQUIN DELTA COLLEGE

Once the decision was made to implement the Quali Financial System, San Joaquin Delta formed a project team. The team included the director of finance, the director of payroll, the director of purchasing, three budget analysts, a representative of accounts payable, an accounts payable processor, and three technology representatives. Additionally, the college convened a steering committee to provide oversight of the budget and accountability.

To ensure a successful implementation, Delta contracted project management services from rSmart. The greatest challenge and risk in the Delta implementation was resource loading. Like the implementation at Colorado State, Delta College did not staff the project with full-time resources and backfill positions. The Delta team members continued to fulfill their core job duties throughout the implementation. This approach was tested by unexpected personnel changes and a budgeting season of unprecedented difficulty.

The rSmart project manager maintained the broad view of the project and allowed the taxed staff members to focus only on the discrete tasks required. As resources changed and issues arose, she developed alternative approaches.

Together, the project manager and college leaders identified which tasks to assign to employees and where to use the rSmart team. Matt Coombs, Senior Director of Systems Development, explains, "It was really important to build the capability and confidence within our team to set us up for our future with the system, but we couldn't get there without rSmart's help. They were critical in completing work that we didn't have the experience to do and in taking over portions of the project that were falling behind. We could not have done this without them."

The San Joaquin Delta team continues to adjust to find the right balance. Dr. Jon C. Stephens, Vice President of Business Services, says, "There was a point in the project where both rSmart and our leadership team agreed that we were leaning too heavily on rSmart, and we didn't have the kind of ownership over the project that we needed. We have made some adjustments to encourage the team to take greater responsibility for the project success, and we are seeing a nice transition. I think that we all did what was needed to keep the project on track, and now we're moving into a new phase that requires more ownership on the part of our staff."



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“We had a strong understanding of the community and the system, but none of us had been through a Quali implementation. By using a project manager from rSmart, we were able to more quickly become aware of implementation successes and issues at other institutions and incorporate that information into our plan.”

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—Lee Belarmino  
Chief Information Officer



## PLAN RSMART

rSmart can reduce risk in your Quali Financial System implementation plan. rSmart works with the planning team to match institutional resources and skills to project needs, and to determine where unique rSmart expertise or additional staffing provides greatest benefit.

At Colorado State University, rSmart was a flexible resource to staff key aspects of the project and to provide guidance to the CSU staff. rSmart has developed tools and processes to assist with several of the most critical aspects of the conversion process.

rSmart can also provide the project management function for Quali Financial System implementations, allowing the institutional team to benefit from best practices and risk management strategies gained from previous Quali implementations.

At San Joaquin Delta College, rSmart initially provided comprehensive project management services, leading and driving the implementation. As the Delta College implementation progressed, the leadership team absorbed more of this role, preparing the campus team to take full responsibility for the long-term success of the Quali Financial System.



# TRAIN

How do institutions support their communities to begin using a new system? While training is a component, there is much more to this process. Has the system been designed in an intuitive fashion that allows staff to feel comfortable quickly using the system? Is the new system the only change, or are there significant business process changes as well? How have the changes been communicated to create a positive environment for change?

Fundamentally, how has the institution managed this change and prepared its staff for success?



## TRAIN SAN JOAQUIN DELTA COLLEGE

The training process for San Joaquin Delta College was tightly coupled with implementation planning and communication efforts.

When Delta convened its Kualo implementation team, the group required a common understanding of the system. rSmart provided a broad training to the members of the project team. This training described the system design, the key components, and the match to higher education financial processes. This training provided the team with a common and broad knowledge base of the Kualo Financial System and allowed the team to focus on specific elements of implementation planning.

The change that Delta sought through its implementation was more than simply a new finance system. President Raúl Rodríguez and Dr. Jon C. Stephens, Vice President of Business Services, sought fundamental changes in the college's business processes, for the purpose of creating more empowered and distributed financial management. With this goal in mind, the project team developed a fiscal officer training and certification process in order to support the effectiveness of fiscal officers. Training sessions provided the case for change to the decentralized approach. Fiscal officers learned new processes,

new responsibilities, and how the Kualo Financial System would support their success.

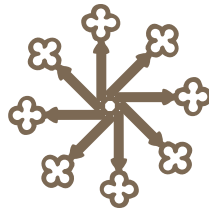
Training the Delta functional users on the Kualo Financial System was a community endeavor, leveraging the strengths of Delta's functional and technical Kualo experts, the rSmart team and contributors from around the Kualo community. Experts from Indiana University and Michigan State University participated in training Delta College's financial system users.

Time for the training was compressed as the timing of the Kualo Financial System release caused Delta College's go-live date to be very tight. Users gained significant experience and training on the Kualo Financial System through the testing process. The rSmart team developed test plans and scripts and completed initial testing to address system issues and defects. rSmart trained Delta's functional leads on the system and test plans, and then engaged that group in testing and training. Maria Bernadino, Director of Purchasing, was a leader in this process: "The testing experience provided hands-on training and created comfort with the system. Our users felt very comfortable navigating their work using the new system. While our timeline was rushed, it was an efficient way to learn the system."



#### Training Development and Delivery Owners

<b>Training Activities</b>	<b>Delta Experts</b>	<b>rSmart Team</b>	<b>Kuali Community</b>
Define outline for user training	X	X	
Assign training topics to experts		X	
Prepare trainers		X	
Develop training materials	X	X	X
Present training to users	X	X	X



## TRAIN RSMART

rSmart has found that institutions benefit from training on the Kualu Financial System at a variety of different points in the evaluation and implementation process.

There is benefit in providing early, broad training to project leaders. Whether the group is a formally sanctioned project team or a group of early advocates, the team can make better decisions about the path forward with a broad and common understanding of the Kualu Financial System.

As part of the initial Proof of Concept evaluation, rSmart trains users in the basic functions of the system. This allows users to have a hands-on experience with the system, using their own data. The opportunity to navigate and experience the system builds confidence and excitement across the user base.

rSmart has contributed to end-user training in a variety of ways. Both San Joaquin Delta and Colorado State benefited from having lead users actively engage in training the broader user community. These lead users are often juggling many responsibilities, and rSmart can support them and set them up for success in their training role.

At each point in the evaluation and implementation process, rSmart will assist by providing the training needed for confidence and success.



# SUPPORT

LONG - TERM SUCCESS

San Joaquin Delta College

rSmart

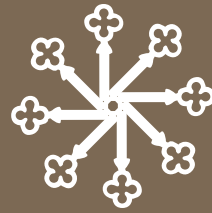


## SUPPORT

### SAN JOAQUIN DELTA COLLEGE

Delta College plans to continue its close partnership with rSmart to support the Kualu Financial System. “We are setting up an initial help desk to triage issues that come in from our users. We do not want the help desk trying to find the right developer in the community to address issues. Our plan is to route the issues to rSmart, and leverage their understanding of both the system and community to get issues resolved,” explains Matt Coombs, Senior Director of Systems Development.

“We are confident that rSmart will provide a level of support that is consistently higher than anything that we have experienced from our traditional proprietary software vendors,” continues Mr. Coombs. “Leaning on rSmart for support will allow us the bandwidth to remain engaged in the leadership of the Kualu community, while ensuring excellent service and support for our campus community.”



## RSMART

rSmart enables all institutions to use the Kualu Financial System with confidence, because rSmart offers reliable and effective support, deep knowledge of the Kualu Financial System, and strong relationships across the Kualu community.

rSmart has gained experience by providing support for the rSmart Sakai CLE for dozens of insti-

tutions. The company also has the deep experience with the Kualu software and community that is needed to offer such comprehensive support. No other company has the experience and expertise to support your institution's long-term success with the Kualu Financial System.

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### SOFTWARE SUPPORT AND MAINTENANCE

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#### SUPPORT FUNDAMENTALS

Access to a tested and certified rSmart Kualu Financial System software distribution; functional and technical support; issue resolution; regular updates & patches; and access to documentation & tools

#### ADVANCED CUSTOMIZATION SUPPORT

Pre-purchased, discounted support hours that extend core support to include support for local customizations and other unique requirements

#### PREMIUM CASE MANAGEMENT

A named support contact and premium support service level agreement

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### MANAGED SERVICES

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#### HOSTING

Kualu Financial System as a service, including high availability access to the software, security, performance, and disaster recovery

#### MANAGED IT SERVICES

A customized set of services like hosting but with hardware and infrastructure at the client site

#### ADVANCED CONFIGURATION MANAGEMENT

Tools, training and services to ensure that the institution's customizations are regularly aligned with the community codebase



# CONTINUE

## THE PATH AHEAD

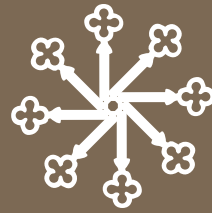
What is next for the organizations that have implemented the Kualu Financial System? Are they better positioned to support the success of their institutions and to contribute to the broader higher education community?



## CONTINUE SAN JOAQUIN DELTA COLLEGE

San Joaquin Delta College still has significant work to do to complete its full implementation of the Kualu Financial System. “We are very pleased with the aspects of the system that we are using in a production environment today, and we look forward to bringing the rest of our processes into the Kualu Financial System,” says Dr. Jon C. Stephens, Vice President of Business Services. “We expect to be live with all of our financial processes in January, 2010.”

Delta College began this endeavor with the specific goal of achieving something that could be shared with other institutions, particularly community colleges. “We felt a strong obligation to meet not only San Joaquin Delta’s needs, but to meet the needs of all community colleges,” says Chief Information Officer Lee Belarmino. “Our greatest satisfaction will not be our success, but it will be seeing other community colleges using the Kualu Financial System, saving money, and leveraging our investment. If there is anything that I can do, or that our college can do, to assist other colleges in better understanding Kualu, we would be honored to assist.”



## CONTINUE RSMART

rSmart will continue to assist a variety of institutions to successfully evaluate, implement and support the Kualii Financial System and other Kualii offerings.

At the time that this book went to print, the Naval Postgraduate School (NPS) had just gone live with the Kualii Financial System core, and NPS will continue to implement additional modules over the next year. "The story and experience of NPS is very different from Colorado State University and San Joaquin Delta College," explains rSmart CEO, Chris Coppola. "We look forward to working with them to share their story and to provide a different approach and perspective. It has been an exciting project and we congratulate their success."

rSmart is working with several other institutions that are at different phases in their process, such as:

- Iowa State University is working with rSmart to have the Kualii Financial System live in 2011. Iowa State University has a complex environment with many interconnected systems and is planning to use Kualii Rice as the centerpiece of its enterprise architecture.

- The Research Foundation of the City University of New York has completed an extensive Proof of Concept and is proceeding with implementation of the Kualii Financial System, in preparation for live use of the system in 2010.
- The University of Arizona completed a Proof of Concept in the same timeframe as Colorado State University and is well into its implementation of the Kualii Financial System, with plans to be live in 2010.
- The University of Connecticut is completing a Proof of Concept with rSmart to evaluate replacing its legacy FRS system.
- The University of Hawaii has completed a Proof of Concept with rSmart. The University of Hawaii is beginning implementation and planning to bring up the Kualii Financial System for all 10 campuses in 2011.

rSmart and the broader Kualii community look forward to helping these institutions and others to succeed with the Kualii Financial System.