Introduction

- Summary from BOT 8-3-11 Meeting
- Kuali Overview
- Business Case
- Project Scope
- Completed to Date
- Project Challenges
- Next Steps
- Project Governance, Oversight and Controls
- Website
Kuali Financial System (KFS) is proven to be viable financial software (designed by higher education for higher education)

Extensive broad evaluation of KFS completed at UConn and by the Kuali Community; confirmed by Gartner

KFS determined to fit UConn’s current and future needs

Project is managed closely by Finance and UITS
Kuali is a growing community of universities, colleges, businesses, and other organizations that have partnered to build and sustain *open-source software for higher education, by higher education*.

*Kuali* software is designed to meet the needs of all sizes of institutions, from land-grant research universities to community colleges. The members of the Kuali Community share a common vision of open, modular, and distributed systems for their software requirements.
UConn has been using SungardHE’s Financial Records System (FRS) since 1991.

FRS has reached the end of its useful life. SungardHE reported it would cease product support in December 2011.

In 2004, UConn and the UCHC contracted with Computer Sciences Corporation (CSC) to develop a Financial Systems Strategy and Roadmap.

The CSC report was essentially the Business Case for the replacement of FRS.
Value Proposition (2005 CSC Study)
Examples:
- Less processing time (workflow); elimination of paper based processing; better internal controls; higher-education specific application; and better customer/user service
- Minimize cost including future upgrades, licensing fees, maintenance, etc.
- Reduce shadow systems and the resulting data redundancy
Risks were identified
- Preliminary cost estimates were developed
- Preliminary scope was defined
- Preliminary resource requirements defined
- Organization and governance
  - Finance should be sponsor and owner of system
  - Buy in from academic, student affairs, athletics, and other non central administrative areas
  - Strong commitment, leadership, and communication essential to success
Project Scope

- Kuali Financial System
- Financial Data Mart/Reporting
- Kuali Rice
- Total Budget for all 3 projects is $16.4M, including contingency (on budget through 12-31-11)
- Project began February 1, 2011; go-live target is July 1, 2012 (on schedule)
KFS Project Phases and Completion

- Project Planning (7/1/11- completed)
- Business Requirements Analysis (8/30/11- completed)
- Design and Configure (12/31/11- completed)
- Build and Test (4/30/12)
- Training (6/29/12)
- Deploy (7/16/12)
Project Challenges

- Multiple integration points and contemporaneous system upgrades (e.g. FAMIS and BottomLine)

- Five open positions (temporary staff have been required to maintain the schedule) and consulting staff turnover

- Enterprise-wide Data Warehouse foundation/platform (this should be completed in concert with Data Mart project to ensure consistency)
Next Steps (3 months)

- Next Phase: Build and Test (completion date 4/30/12)
  - Complete validation testing
  - Complete technical specs and coding for all required enhancements
  - Complete coding for all system integration points
  - Develop new reports and queries from KFS DataMart
  - Begin End-to-End User acceptance testing in April
- Develop User Training document
Robust Governance and Oversight
- Manage to the rSmart fixed price contract
- Monthly budget review and oversight
- Business case to manage/align against
- Weekly Project Leadership meeting
- Weekly Project Coordination meeting with Functional and Technical Project Managers
Robust Governance and Oversight (cont.)
- Monthly Governance Council meetings
- Monthly Advisory Council meetings
- Various other meetings such as Subject Matter Experts, Data Mart, Kuali Identity Management, Testing, etc.
- Strong leadership and quick problem resolution/escalation
Project Change Control

- Project Charter
- Project monitoring and tracking including detailed Functional and Technical Project Plans and milestones
- Manage and limit scope creep/changes
- Risk assessment and management
- Communication Plan
- Conversion Strategy
- Testing and Training Plans
KUALI SYSTEMS WEBSITE

www.kuali.uconn.edu