AGENDA

- Archibus Demo
- SOAR Project Updates
- SOAR Training Curriculum
- Announcements & Deadlines

Archibus Demo

Kathy Johnson, Physical Plant

Archibus

- Archibus Overview
- Archibus Status
- Archibus Future

Archibus

DEMONSTRATION

Archibus

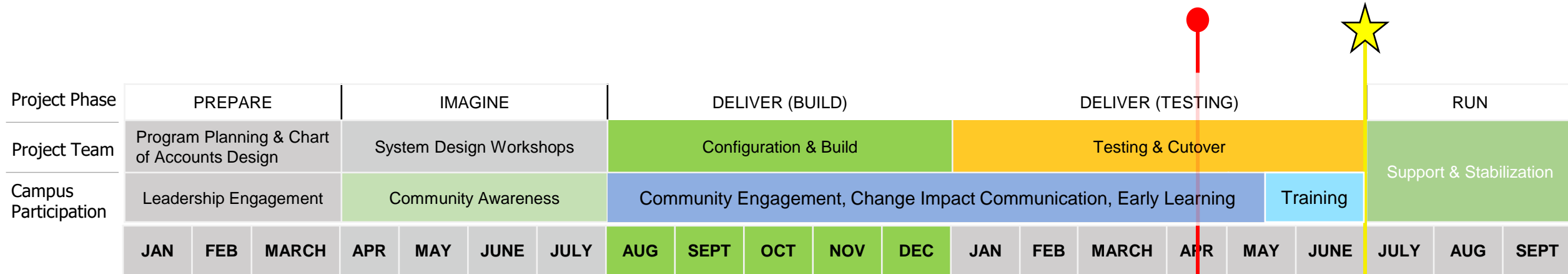QUESTIONS?

SOAR Updates: Timeline, Testing, Cutover & Training

Shundra White Helton, ITS

SOAR Timeline

We are here **Launch: July 1, 2025**

Project Phase	PREPARE		IMAGINE				DELIVER (BUILD)					DELIVER (TESTING)						RUN		
Project Team	Program Planning & Chart of Accounts Design		System Design Workshops				Configuration & Build					Testing & Cutover						Support & Stabilization		
Campus Participation	Leadership Engagement		Community Awareness				Community Engagement, Change Impact Communication, Early Learning										Training			
	JAN	FEB	MARCH	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MARCH	APR	MAY	JUNE	JULY	AUG	SEPT

Recent Accomplishments
- Completed / successfully exited SIT 1 (testing)
- Finalized end user training curriculum
- Launched Manager Readiness series
- Enhanced SOAR website calendar

Testing Update

Summary: In Progress

- **SIT2 – Day 1 of Week 6** of testing
- **87% Test Execution** completed.
- **40** defects in **New** status and **24** defects in **Open** status
- **29** defects in **In Progress** status, **16** defects in **Retest** status and **19** defect in **Fixed** status
- **Boundary Systems**:
  - **56 total integrations from 36 boundary systems** based on integration with different workstreams
  - **18** integrations testing **completed**
  - **29** integrations functional testing **in progress**
  - **8** integrations functional testing **not started**
  - **5** integrations technical development **in progress**

Overall Execution

Planned	100%	Actual	87%

Execution Dashboard

Track	Planned	Actual	Pass %		Track	Planned	Actual	Pass %
RTR	100%	97%	98%		SEC	100%	100%	100%
PTP	100%	97%	99%		HCME2E			
PGM	100%	95%	99%		E2E	100%	47%	100%
HCM	100%	65%	92%		BSYS	100%	32%	
EPM	100%	88%	95%		PCT1			

SIT2 Defect Dashboard

New / Open / In Progress Status					
Priority	Critical	High	Medium	Low	Total
Count	1 ←	15 ↑	97 ↑	18 ↓	131 ↑

Status Legend

🟩 Less than 5% off track	🟨 Between 5 to 15% off track	🟥 Greater than 15% off track

User Acceptance Testing (UAT) Approach

- **UAT Overview**
  - Ensure the system meets business requirements and is ready for end users
  - Ensure that Boundary Systems interacting with Oracle Cloud Applications function correctly
  - Validate that the system performs in real-world
  - User Acceptance Testing Dates: **4/28/2025 – 5/30/2025 | 5 weeks***
- **Testing Structure:**
  - **2 weeks** workstream-specific testing
  - **3 weeks** end-to-end (E2E) cross functional business process testing
  - Testing by **extended users/testers**
    - Focus on role-based testing for their department/college
    - Workstream leads shift from performing tests to leading testers

Estimated 3 Hours / Day over 5 Weeks

*Assumes on-time successful SIT2 exit.

Cutover / Blackout

	Cutover Plan / Roadmap	Outlines the activities to plan and execute the campus users' transition from the legacy processes to the new Oracle Cloud processes. Includes tasks to plan and execute the movement from the legacy systems to Oracle Cloud system. It includes data conversions, integrations, and manual configurations as well infrastructure deployment.
	Blackout Period	A temporary period during cutover, in which certain/all transactional features of Banner and any integrated Boundary systems will not be accessible by the end users.
	Data Conversion	The process of changing data from one format to another so that it can be used in a new system or application. It is the process of translating historical data and chart of accounts from an old system into a format that a new system can understand and use effectively.
	Boundary Systems	Any current UofM system or software that houses financial, human resources, and budget-related data that will need to be shared with the Oracle Cloud system.

Cutover / Blackout: Transactions

Leading up to go-live the following are *some* transactions that will be halted or limited*, in support of a smooth cutover/data conversion. Specific information for each, including timing and alternate processes – where applicable - will be communicated in advance.

Projects & Grants

- Sponsored program transactions
- Non-sponsored program transactions
- Capital projects data
- Award transactions in Cayuse
- Internship transactions

Procurement/Payables

- Requests for proposals / quotes (RFP/Q)
- Requisitions, POs, Vendor Payment Forms
- Supplier data entry
- Invoices and payments
- Expense reimbursements, travel

Core HR

- Positions: new/change, including budget
- Job (pclass) new/change
- Other Banner HR work structures (new/change)
- Person details and seniority date changes
- eContracts

Budgeting/Finance

- Fixed Assets records

*Subject to change, please stay current with project communications.

Upcoming Events
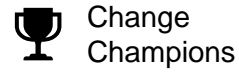
Change Champions   FOFHR   Dean / Faculty Engagement   Newsletter

Advisory   Readiness Sessions   Town Hall   Org Change Readiness Survey

Notes:

- **Manager Readiness Session #3 (4/24)**
- **SOAR Town Hall (5/1)**

We anticipate a greater possibility for changes as go-live nears.

APRIL

SUN	MON	TUES	WED	THURS	FRI	SAT
		1	2	3	4 Close	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

MAY

SUN	MON	TUES	WED	THURS	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16 Blackout	17
18	19	20	21	22	23 Blackout	24
25	26	27	28	29	30 Blackout	31

SOAR Training Information

Danny Linton, Human Resources

Transitioning to Oracle: User Training

Assigned training is being determined first by persona and then by business role. There are usually many business roles associated with a given persona. Organizing by persona makes it easier to align individuals to content and security levels. Below are the user personas for Oracle end user training and descriptions.

All Employees
All UofM community members will need to manage their personal information, time reporting*, expense submission, and access self-service functions.

Department Business Representatives
These individuals have a broad set of responsibilities that cut across multiple modules and training areas.

Faculty / PI / Researchers
Faculty and PIs who are managing research grants, budget, compliance and personnel-related tasks.

Managers / Line Managers
Any manager who will use the system for people management/HR transactions and likely for reporting purposes.

COA Campus Users
Aside from Employee Self Service needs these individuals do not have anything to do with Oracle Cloud but need to understand the Chart of Accounts.

Central Users
People with this persona have specialized roles within various BFS offices functions including; HR, FP&A, Accounting, Procurement, and Grants that support the campus wide enterprise.

Financial Managers & Department Initiators
Any individual with budget management responsibilities, including reporting, budget forecasting and revisions.

User Training: When, Where, & How

Training will start towards the end of May with virtual and in-person learning as well as web-based courses. Training will instruct the users how to navigate the new system and perform tasks related to their job function. The amount of training will vary by role and system access requirements.

When

- Virtual Training (VILT) and In-person Training (ILT) will begin towards the end of May and feature introductory content
- Web-Based (WBT) training follows first introductory VILT courses

Where

- VILT will be held in MS Teams similar to readiness sessions
- ILT will be held on-campus in locations TBD
- WBT will be available via Canvas

How

- ILT and VILT Training will be conducted by workstream leads and UofM colleagues, who will be prepared as instructors via a train-the-trainer program. ILT will include practical exercises to provide users experience with the new system.
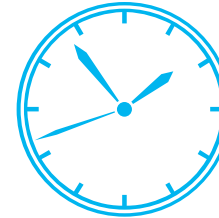
Training Persona: All Employees

All Employees
All UofM community members will need to manage their personal information, time reporting*, expense submission, and access self-service functions.

Includes the Following:
- *All Employees*
- *All HCM Users*
- *All Staff*

5-11.5 Hours

Role	Oracle Module	Course Name	Estimated Course Duration
All Employees	Core HR	Employee Self Service Overview	3
	Employee Expenses	Expense Management/Employee Expense Processing	4
	Talent Management	Talent Management	1
	Time and Absence	Managing Time and Attendance	2
All HCM Users	Human Capital Management Overview	Oracle Cloud HCM Overview	1
		Accessing Employee Data	.05
All Staff	Talent Management	Talent Management	1

*Subject to change. Assigned courses may not entail the entire list.
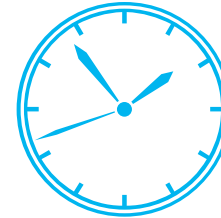
Training Persona: Department Business Reps

Department Business Representatives
These individuals have a broad set of responsibilities that cut across multiple modules and training areas.

Includes the Following:
- *Business Officers*
- *Finance Administrators*
- *Department Purchasers*

17-34 Hours

Role	Oracle Module	Course Name	Estimated Course Duration
Business Officers	Core HR	Direct Hire	5
	Employee Expenses	Expense Management/Employee Expense Processing	4
	General Ledger	General Ledger Overview	1
		General Ledger Administration	1
		SOAR General Entry Reporting and Financial Management	3
	Procurement	Manage Receipts and Returns	2
	Procurement Payables	Procurement: Managing Payables	1
	Projects and Grant Management	Performing Project Cost Management	1
		Project Budgeting	1
		Project Maintenance	1
		Project Planning	1
	Purchasing	Purchase Order Management/Vendor Management and Payment	3
	Self-Service Procurement	Requisition Management and Approval/Procurement Request Processing	3
	Supplier Portal	Supplier Management	4
	Enterprise Performance Management	Budgeting	3

*Subject to change. Assigned courses may not entail the entire list.
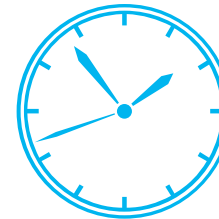
Training Persona: Department Business Reps (cont.)

Department Business Representatives
These individuals have a broad set of responsibilities that cut across multiple modules and training areas.

Includes the Following:
- *Business Officers*
- *Finance Administrators*
- *Department Purchasers*

17-34 Hours

Role	Oracle Module	Course Name	Estimated Course Duration
Department Purchasers	Employee Expenses	Expense Management/Employee Expense Processing	4
	Procurement	Manage Receipts and Returns	2
	Procurement Payables	Procurement: Managing Payables	1
	Purchasing	Purchase Order Management/Vendor Management and Payment	3
	Self-Service Procurement	Requisition Management and Approval/Procurement Request Processing	3
	Supplier Portal	Supplier Management	4
Finance Administrators	Employee Expenses	Expense Management/Employee Expense Processing	4
	Procurement	Manage Receipts and Returns	2
	Procurement Payables	Procurement: Managing Payables	1
	Purchasing	Purchase Order Management/Vendor Management and Payment	3
	Self-Service Procurement	Requisition Management and Approval/Procurement Request Processing	3
	Supplier Portal	Supplier Management	4
	Enterprise Performance Management	Budgeting	3

*Subject to change. Assigned courses may not entail the entire list.
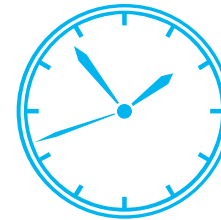
Training Persona: Faculty/PI/Researcher

Faculty / PI / Researchers
Faculty and PIs who are managing research grants, budget, compliance and personnel-related tasks.

Includes the Following:
- *Faculty*
- *Principal Investigator*
- *Researcher*

2-3 Hours

Role	Oracle Module	Course Name	Estimated Course Duration
Faculty	Projects and Grant Management	Project Budgeting	1
		Project Planning	1
	Talent Management	Talent Management	1
Principal Investigators	Projects and Grant Management	Project Budgeting	1
		Project Planning	1
Researchers	Projects and Grant Management	Project Budgeting	1
	Projects and Grant Management	Project Planning	1

*Subject to change. Assigned courses may not entail the entire list.

*Subject to change. Assigned training will likely be a portion of the entire list.
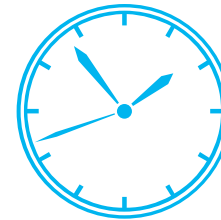
Training Persona: Managers/Line Managers

Managers / Line Managers
Any manager who will use the system for people management/HR transactions and likely for reporting purposes.

Includes the Following:
• *Managers / Line Managers*

8 Hours

Role	Oracle Module	Course Name	Estimated Course Duration
Line Managers/Supervisors	Core HR	Manager Self Service Overview	3
	Recruiting	Recruitment Deep-Dive	2
	Talent Management	Talent Management	1
	Time and Absence	Managing Time and Attendance	2

*Subject to change. Assigned courses may not entail the entire list.

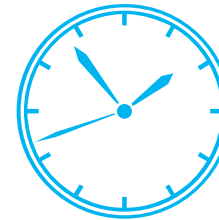# Training Persona: Chart of Account (COA) Campus Users

COA Campus Users
Aside from Employee Self Service needs these individuals do not have anything to do with Oracle Cloud but need to understand the Chart of Accounts.

Includes the Following:
- *ASF*
- *UofM Foundation*

3 Hours

Role	Oracle Module	Course Name	Estimated Course Duration
ASF	General Ledger	SOAR General Entry Reporting and Financial Management	3
UofM Foundation	General Ledger	SOAR General Entry Reporting and Financial Management	3

*Subject to change. Assigned courses may not entail the entire list.

# Training Persona: Central Users

Central Users
People with this persona have specialized roles within various BFS offices functions including; HR, FP&A, Accounting, Procurement, and Grants that support the campus wide enterprise.

Includes the Following:
- *Accounting*
- *Central Finance Reporting Administrator*
- *Central Grants Administrator*
- *Central Office*
- *Procurement Team*
- *Project Accountant*
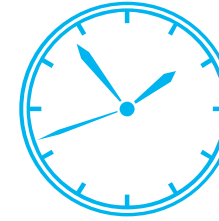
4-14 Hours

Role	Oracle Module	Course Name	Estimated Course Duration
Accounting	Employee Expenses	Expense Management/Employee Expense Processing	4
	General Ledger	SOAR General Entry Reporting and Financial Management	3
	Procurement Payables	Procurement: Managing Payables	1
	Sourcing	Supplier Management and Negotiation / Sourcing Strategy and Vendor Selection	2
	Supplier Portal	Supplier Management	4
Central Finance Reporting Administrator	Projects and Grant Management	Performing Project Cost Management	1
		Project Budgeting	1
		Project Maintenance	1
		Project Planning	1
Central Grants Administrator	Projects and Grant Management	Contract Setup and Management	1
		Performing Project Cost Management	1
		Project Budgeting	1
		Project Maintenance	1
		Project Planning	1

*Subject to change. Assigned courses may not entail the entire list.

# Training Persona: Central Users (cont.)

Central Users
People with this persona have specialized roles within various BFS offices functions including; HR, FP&A, Accounting, Procurement, and Grants that support the campus wide enterprise.

Includes the Following:
- *Accounting*
- *Central Finance Reporting Administrator*
- *Central Grants Administrator*
- *Central Office*
- *Procurement Team*
- *Project Accountant*
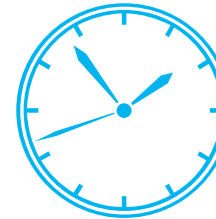
4-14 Hours

Role	Oracle Module	Course Name	Estimated Course Duration
Central Office All	General Ledger	General Ledger Overview	1
		General Ledger Administration	1
		SOAR General Entry Reporting and Financial Management	6
	Oracle Learning	Learning Administration, Transcript, and Reporting	3
	Talent Management	Talent Management	1
Procurement Team	Purchasing	Purchase Order Management/Vendor Management and Payment	3
	Self-Service Procurement	Requisition Management and Approval/Procurement Request Processing	3
	Sourcing	Supplier Management and Negotiation / Sourcing Strategy and Vendor Selection	2
	Supplier Portal	Supplier Management	4
Project Accountant	Projects and Grant Management	Performing Project Cost Management	1
		Project Budgeting	1
		Project Maintenance	1
		Project Planning	1

*Subject to change. Assigned courses may not entail the entire list.

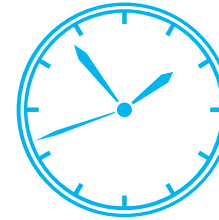# Training Persona: Financial Managers & Dept. Initiator

Financial Managers & Department Initiator
Any individual with budget management responsibilities, including reporting, budget forecasting and revisions.

Includes the Following:
- *Finance Manager*
- *Department Initiator*
- *Department Head*

12-14 Hours

Role	Oracle Module	Course Name	Estimated Course Duration
Department Heads	Employee Expenses	Expense Management/Employee Expense Processing	4
	Purchasing	Purchase Order Management/Vendor Management and Payment	3
	Self-Service Procurement	Requisition Management and Approval/Procurement Request Processing	3
	Supplier Portal	Supplier Management	4
Department Initiators	Core HR	Direct Hire	5
	General Ledger	General Ledger Administration	1
		General Ledger Overview	1
		SOAR General Entry Reporting and Financial Management	3
	Recruiting	Recruitment Deep-Dive	2
Finance Managers	General Ledger	General Ledger Administration	1
		General Ledger Overview	1
		SOAR General Entry Reporting and Financial Management	3
	Self-Service Procurement	Requisition Management and Approval/Procurement Request Processing	3
	Supplier Portal	Supplier Management	4

*Subject to change. Assigned courses may not entail the entire list.

Announcements & Deadlines

Danny Linton, Human Resources

Announcements & Deadlines

- Welcome to all first-time attendees at Focus on Finance & HR!

- Need someone added to the Focus on Finance & HR mailing list? Don't forward to them—forward to us!

- hr@memphis.edu

Announcements & Deadlines

- **Part-Time Faculty Exception Form:**
  There is a new form to complete when you have a part-faculty member who needs an exception related to # of credit hours being taught, academic credentials, or salary amount. Check with your HR Business Partner if this situation arises in your department.

Announcements & Deadlines

- **University Records Management:**
  Records Certifications are due by May 31. Trainings available in Learning Curve.

Announcements & Deadlines

- Staff Appraisals are due April 30th for employees not working through a current Probationary Period.

- Employees who completed a recent Probationary Period on or before December 31, 2024, will need an Annual Appraisal (marked as "Other") completed for them for this upcoming Staff Appraisal cycle.

- It is vitally important for each employee to have a complete and accurate annual appraisal captured in SAMS (Staff Assessment Management System) for this current cycle as it will be the last year Annual Staff Appraisals will be completed in the current system and a current rating is needed to be transferred into Oracle.

Announcements & Deadlines

- As we move closer to Oracle Go-Live, we will limit additions & changes to the Chart of Accounts to allow for a smooth transition to the new system.

- As of March 2025, we will not be creating new Account Codes, Program Codes or Org Codes in Banner.
  - Grants and Foundation Funds will still be created as needed
  - Activity Codes can still be created
  - Indexes can still be created

Announcements & Deadlines

Mental Health in May

- The theme this year is "Turn Awareness into Action."

- Human Resources is collaborating with the R. Brad Martin Wellness Center, Here4TN, Counseling Center, and Lambuth to offer a variety of in person events and online webinars. All faculty and staff are invited and welcome to participate.

- Look for a schedule of events to be announced at the end of April.

Announcements & Deadlines

- Departments that complete offer letters for faculty starting in Fall 2025 should watch the language used when discussing salary schedules. Both the old and new language are currently available via templates.

- Remember the different types of faculty positions.

- Reach out to HR if you need help!

Announcements & Deadlines

- Check your org charts!
- https://www.memphis.edu/hr/orgcharts.php
- It is imperative that reporting structures are accurate as we phase into Oracle this summer.
- Need to make changes? Use the Request to Change Position Supervisor action in WorkforUM.
- Remember, we track positions to positions, not people to people.

Announcements & Deadlines

MPLOY Program

- The University is excited to once again host student interns in collaboration with the City of Memphis MPLOY program. The high school student interns will be on campus from June 2nd – July 10th. They will be partnered with departments across the campus where they will learn about the culture of the University and gain real world work experience.

- Departments interested in hosting an intern can fill out the request form here.

Announcements & Deadlines

- Take Our Daughters and Sons to Work Day will be held on Wednesday, May 28th this year. There will be a Q&A panel, tours of departments all over campus, as well as an opportunity to have their picture taken with Pouncer. Participating employees do need permission from their supervisors. This is a great way to help future Tigers get to know our campus and learn about all of the different types of work that happen here.

- Registration is expected to go out within the next few weeks.

Announcements & Deadlines

Social Security Administration Update

- Employees must make an appointment to get a new Social Security card, Replacement, or Name Change.

Scan the QR code to get started. You may be able to start or complete your request online.

1. Open the camera app on a smart phone or tablet.

2. Point the camera at the QR code.

3. Tap the browser that appears.

Announcements & Deadlines

- LinkedIn Learning is available for free to all employees!
- Create your own goals and learning paths or assign them to your team.
- Over 15,000 technical and soft skills development opportunities available!
- You can connect your personal LinkedIn account to share what you've learned.
- Available in the MyMemphis portal.
- Keep this in mind, especially on days we are working remotely because of inclement weather.

Announcements & Deadlines

What should I do if I am injured on the job?

• If it is an emergency, seek treatment at the nearest emergency room. Contact your supervisor and Human Resources as soon as possible to start the claim process.

• In a non-emergency, notify your supervisor immediately of what happened, how it happened, who saw what happened, and if you were injured as a result of the accident. You and your supervisor should then contact the Workplace Injury and First Notice of Loss Call Center at 1.866.245.8588 to speak with a registered nurse who will evaluate the nature of your injury and determine your immediate care or treatment options.

Announcements & Deadlines

What should I do if I am injured on the job?

- If no medical treatment is recommended, the registered nurse will document the call for you and your supervisor and enter an incident report in the reporting system.

- If medical treatment is recommended, the nurse will direct you to the nearest State approved medical provider.

- **You and your supervisor will need to complete the First Report of Injury or Illness form found online at First Report of Injury or Illness. This form should be returned to the Environmental Health and Safety Office. Please complete within 24 hours of the injury. If the accident is not reported within 48 hours, the employee's department will be assessed a fine by the State Comptroller's Office.**

Announcements & Deadlines

Separation & Clearance

- Please remember to immediately complete an online separation notice for any employee in your area that is departing the University prior to their departure date!

- Not doing so places the University at risk because the employee would still have system access and could lead to an audit finding.

- Keep in mind it is HR's practice to process separation/clearances closer to the date of separation so that leave balances can be accurately calculated for payouts.

- https://umwa.memphis.edu/sep-clear

Announcements & Deadlines

- PLEASE make sure that all leave reports for your department are submitted and approved each month!

- This includes all exempt staff and faculty employees.

- Leave reports are due by the 10th of the month following the month being reported.

- Remember to put at least one "0" on any one date for one leave category (such as Annual Leave) in any month in which no leave was used.

Announcements & Deadlines

Next Online Training for *Effective Search Committees*:

- May 8, 2025, 10am
- Sign up in [Learning Curve](#)!

Announcements & Deadlines

Form I-9 Information

- Visit 178 Administration Building, M-F 9am-3:30pm for I-9 assistance, and appointments not needed during these hours.

- HR is also offering online appointments by contacting i9@memphis.edu.

- Other questions? i9@memphis.edu

Announcements & Deadlines

- Remember to review the University's current job openings at workforum.memphis.edu.

- Follow the Division of Business & Finance on X (formerly Twitter) at @uofmemphisbf!

- Subscribe to our WorkforUM X (formerly Twitter) feed at @umemphisjobs!

- Follow us on Instagram! @uofmhr

Thank you for attending!

Next Meeting: May 20, 2025 at *memphis.edu/fofhr*

Recordings & presentations available at *memphis.edu/focus*