



FOCUS ON FINANCE & HR

October 21, 2025



AGENDA

- ITS Security Updates
- SOAR Project Updates, including Training Kickoff
- Announcements & Deadlines

IT Security Awareness Training



Jarrold Taylor, IT Security & Identity Management

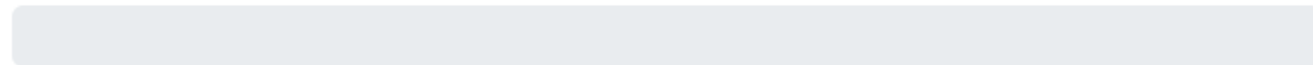


IT Security Awareness Training

- Required annually for all faculty and staff, including student workers
- Due Oct. 31 for current employees; 30 days from hired date for new hires
- Missed deadline = Account restricted until training is completed
- Don't wait! No extensions for leave or technical issues
- 4 components, all on the KnowBe4 dashboard

Training Progress

Completed 0%



 You have completed 0 of 4 assignments.

[Go to Training](#)



No unread messages.

[View Messages](#)

Assignment Name	Type	Status	Due
2025 KnowBe4 Security Awareness Training - 15 Minutes	Training Module	Not Started	17 days left until due date
What is Sensitive Information in the U.S.?	Training Module	Not Started	17 days left until due date
Captain Awareness: Securely Working from Home	Video Module	Not Started	17 days left until due date
IT Security Policies and Guidelines. Click the "Start" button to view. When you return to your training page, click "I acknowledge."	Policy	Not Started	17 days left until due date

IT Security Awareness Training



QUESTIONS?

IT Security Awareness Training: Phishing Simulations



- Emails from ITS that mimic real-world phishing attempts
- Evaluating effectiveness of training & identifying weak points in security
- 6,000 employees. Cybercriminals only need one.
- Beginning in November: 3 failures = additional training
- Employees will have 30 days from enrollment to complete additional training. System access will be deactivated if training is not completed.

IT Security Awareness Training: Phishing Simulations



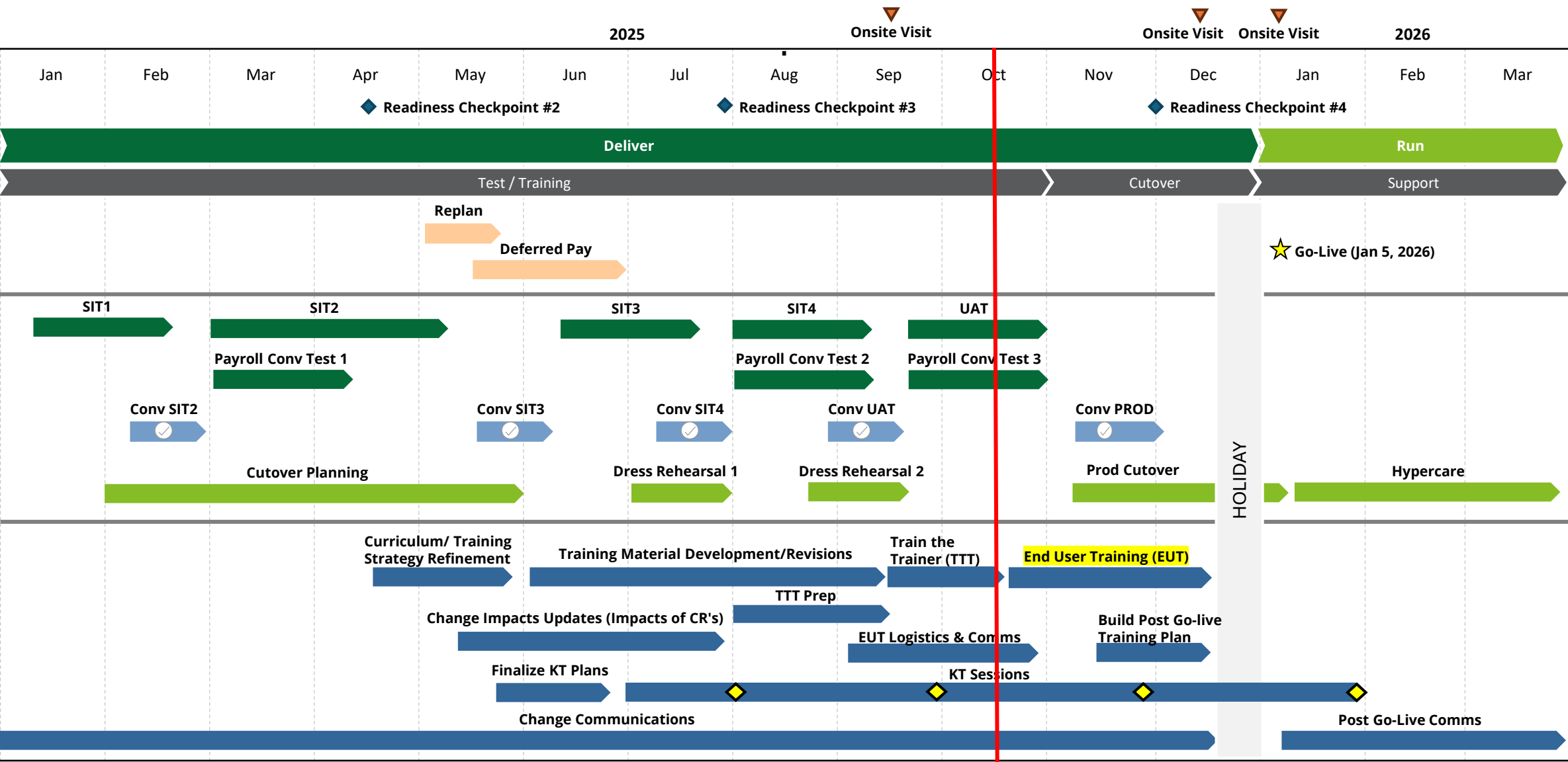
QUESTIONS?

SOAR Project Updates



Shundra White Helton
ITS, SOAR: Organizational Change Management Lead

SOAR Timeline | Transition to Oracle Cloud



Cutover, Blackout, Preparation Activities Begin



Cutover is a process of migrating systems, processes and related data from current legacy systems to the new cloud ERP system.



Blackout Period is a temporary period during cutover, in which certain/all transactional features of Banner, Boundary and OracleCloud systems will not be accessible by the end users



Preparation Activities are proactive tasks and steps taken to ensure the people, process and transactions of the university are performed during the transition to Oracle

Project & Grants Management (PGM)

Cutover Announcement: Sponsored Programs



Sponsors and Researchers: No new sponsor or researchers will be created or added in Cayuse after November 26, 2025.

Internships/Dual Service Agreements: No new internships and dual service agreements between **November 20, 2025 and January 5, 2026**

Contingency: If you anticipate an immediate need during the blackout period, contact grants@memphis.edu

Cutover Announcement: Proposals Submissions to Sponsors



**Proposal Submissions due December 8 –10, 2025 must be
routed by December 2, 2025.**

These proposals will be submitted to the Sponsor on
December 8th.

Blackout Date: December 9 (No Cayuse access)

Cutover Announcement: New Award/Continuation/Amendments Setup (Cayuse)



Last import to Banner will be Sunday, November 30, 2025.

Submit Notice of Award Promptly

Cutover Announcement: General Ledger, GL Balances (Formerly Banner Finance)



Department Initiated **Labor Redistributions** should be completed by **December 15, 2025**. No labor redistributions will be performed after December 15th for Banner payrolls.

January period will be open in new Oracle Cloud System on January 5 and will have Banner data through November 2025.

December's data will not be in Oracle until January 18, 2026. This includes Non-sponsored Programs budget.

Human Capital Management (HCM)

Cutover Announcement: eContract Submissions



The last day to originate an e-contract is **November 19, 2025**.

These e-Contracts must be completely approved and in the Shared Services queue by **November 21, 2025**.

There will be NO E-CONTRACTS created between **November 19 thru January 4**. New e-contracts for these modules can be created in Oracle beginning January 5, 2026.

Examples of hires processed through eContracts

- Extra Compensation
- Faculty Summer Compensation
- Graduate Assistants
- Part-Time Faculty
- Student Workers
- Temporary Employees
- One-Time Pays (students and temps)

Cutover Announcement: WorkforUM Actions



All **WorkforUM actions** must be submitted and in HR's queue by
Friday, November 14, 2025.

Staff postings must be completed & **finalized by November 30, 2025.**

Active Faculty postings may continue in WorkforUM until a candidate is selected.

Any actions (excluding actions related to active faculty) received Saturday, November 15th -
will need to be cancelled and submitted in the new system beginning January 5, 2026.

Cutover Announcement: New/Existing Position Changes



Effective December 1, 2025, all HR transactions in Banner will end.

What does this mean?

No new actions will be accepted that impact positions, job records, person data (such as name changes, addresses, etc.) and employee deductions (taxes, parking, campus rec, etc.) until January 5, 2026 – with Oracle go live.

Please **hold new actions** until official notification goes out that these processes have resumed.

For emergency actions, reach out to your Senior HR Business Partner.

Cutover Announcement: Payroll, Timesheets, Leave, etc.



**Payroll,
Timesheets and
Leave Reports
will continue in
Banner through
December 2025.**



**Employee
Separations will
continue in
Banner through
December 2025.**

Procure to Pay (PTP)

Cutover Announcement: Travel Authorization / Expense Report / Reimbursements



No preauthorization after **Sunday, November 30, 2025.**

No expense reports in Chrome River after **December 15, 2025.**

No reimbursements will be processed between **December 15, 2025 - January 5, 2026.**

Any contingencies?

Answer: No. Anything after the **deadlines** will have to be created or recreated in Oracle after **Jan 5, 2026.**

Cutover Announcement: Purchase Orders, Change Orders & Requisitions



Purchase Orders needed for **December / Early January** should be entered by **Sunday, November 30, 2025**.

- No new POs will be created in **December**.
- The Blackout for POs is **December 1, 2025 – January 4, 2026**.
- Requisition processing will resume when Oracle launches in **January**.

Cutover Announcement: Accounts Payable



The last payment run will occur on December 18, 2025.

No Accounts Payable entries between December 19, 2025 –January 5, 2026, in Banner.

Invoices without completed approvals will have to be resubmitted after go-live.

Contingency?

PCards should be utilized for incidental purchases. Invoice and Payment processing will resume in January in Oracle.

Cutover Announcement: International/Wire Payments



**Wire journals must be dated before
December 23, 2025**



Oracle Training



Training is finally here!

Training Formats



Web-Based Training (WBT)

A method of delivering educational content and instruction online through a web browser, requiring an internet connection. These trainings are available online 24/7.



Instructor-Led Training (ILT)

A live, synchronous learning method where an instructor teaches a group of participants, in a physical classroom or space.



Virtual Instructor-Led Training (VILT)

A **real-time, live online** learning experience where an instructor and students in different locations connect via video conferencing to participate in a training session.

New Terminology: Personas



Personas: In Oracle, a persona is a user identity with a specific set of permissions that determines their access and role within a system.

At the University of Memphis, we have the following personas:

- All Employees
 - All Employees (literally)
 - All Employees (except exempt graduate assistants & part-time faculty – Timecard Employees)
 - All Faculty & Staff (regular, retirement-eligible employees)
- Department Business Representatives/Department Initiators (e.g. business officers)
- Department Heads (financial managers)
- Managers/Line Managers (direct supervisors)
- Faculty/PIs/Researchers
- Learning Administrators & Local Learning Administrators (those responsible for a given set of trainings)
- Central Users (users in administrative offices, like HR, Procurement, etc.)



How To Access Training

Where do I go to register for training?



Visit the SOAR Training Website.
soar.memphis.edu

Select the Training tab

(a) Select the Training Track (HCM, PGM, etc.)
you'd like to view
or (b) Scroll and view all available trainings

Home > SOAR > Training

Training

Training is one of the most critical components of our transition to Oracle Cloud. We offer ample opportunities to engage with and learn a new way of working through first-hand experience.

Each training is categorized by track, and each course contains the persona(s) it is designed for.

For more information about Oracle Cloud, visit the [Resource Hub](#).

Training Tracks:

- **HCM: Human Capital Management (HR/Payroll)**
- **EPM: Enterprise Performance Management (Budgeting)**
- **PGM: Projects & Grants Management (Grants)**
- **PTP: Procure to Pay (Procurement)**
- **RTR: Record to Report (Accounting)**

Training Formats:

- **WBT — Web-Based Training** (online 24/7)
- **ILT — Instructor-Led Training** (in person, instructor-led training)
- **VILT — Virtual Instructor-Led Training** (online instructor-led training)

How do I register for training?



VILT (Virtual Instructor-Led Training)

Registration is via **Teams**.

Take note of the date, time and duration before registering.



ILT (Instructor-Led Training)

Registration via **Learning Curve** (learningcurve.memphis.edu) under the **Oracle** category.

Note the date, time and duration before registering.

Noted as "in-person" and limited to 25 learners

Courses available from October 20, 2025, until Go-Live.



WBT (Web-Based Training)

Course registration is a direct link to **Canvas**.

Courses available from October 20, 2025 until & after Go-Live.

Oracle Learn will be the official home for WBT post Go-Live.

Other Things to Mention

- The published duration of training is an **estimate**.
- Registration and attendance will be used to track training participation. Please note, this tracking is to better provide the necessary resources for employees to perform their duties/tasks.
- In Oracle, new user groups may be responsible for new/different tasks — communication should make it clear that the message applies to them as well.
- Trainings will be regularly scheduled after Go-Live.
- The frequency will be different, but employees will still have opportunities to learn the system after the original designated training window.

Trainers



- Melissa Ramage
- Latica Jones
- Becky Ward
- Cassandra Dinwiddie
- Christie Barfield
- Monica Cartwright
- Jonathan Barron
- Kerri Reece
- Keith Yates
- Colette Williams
- Luz Gray
- Kate Sims
- Kristil Davis
- Haneefah Broome
- Amanda Clarkson
- Kiana Holley
- Judith Nance
- Rose Pettijohn
- Janel Tresvant
- Tekata Kelson
- Deborah Keeney
- Dorian Campbell
- Candace White
- Susan Boyce
- Madison Ellison
- Dequebenese Norton
- Michelle Collins
- Hilary DeLuco
- Danny Linton
- Terrice Watson
- Heidi Kendall
- Julie Ahart



And lastly, bring a few things with you to training!



Pack your **patience**



...then add a little **kindness & cooperation.**



And don't forget the **POSITIVITY!**

SOAR Survey



Overview

The SOAR Survey analyzes, at a point in time, stakeholder awareness, understanding, and willingness to adopt new processes and technologies.

- Progress is tracked against prior assessments and allows the Organizational Change Management (OCM) team to identify areas that need attention, prioritize and address concerns, and report out results to project leadership.
- Used to identify broad trends by varying corners of UofM. It does not collect or address concerns of individuals.



SOAR Survey 3: Spring 2025

- Significant to moderate increases across **awareness dimension** and **engagement effectiveness across all groups since last survey.**
- **Average Score:** Ranging from **3.3 – 3.6**, *for non-SOAR team members.*
- **Participation:** ~20% of campus community



Upcoming: SOAR Survey 4 October 2025

- ★ **SOAR Survey 4 will be October 28, 2025!**
- ★ Let your voice be heard and help us better connect with the campus community as we get closer to Go-Live.
- ★ Help us increase our participation - *we want to hear from you!*

Reminder: Projects & Grants Management Recording Available

Watch "[What's New in Grants & Faculty Project Management](#)"
via [SOAR Mediasite](#).





Campus Engagements

SOAR Engagement and Resources

 Change Champions

 FOFHR

 Newsletter

 Cutover Communication

 Advisory

 Readiness Sessions

 Town Hall

 Org Change Readiness Survey

 Dean / Faculty Engagement



- **September Town Hall – Recording Available!**
- **Oracle Training Kickoff – Recording Available!**
 - View a recording of previous Town Halls and other live sessions on the [SOAR Mediasite](#).
- Watch your email for communications on Blackout dates.
- November Town Hall (Registration Available Soon)
- Interested in understanding more about SOAR? Invite the SOAR team to a departmental/team meeting. [Visit our Request a Meeting link.](#)
 - Roadshows end 10/31/25
- Continue to email your questions to SOAR@memphis.edu

SUN	MON	TUES	WED	THURS	FRI	SAT
			1	2	3	4
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	31	

QUESTIONS?

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

As we move closer to Oracle go-live, we have limited additions & changes to the Chart of Accounts to allow for a smooth transition to the new system.

- We are no longer creating or modifying Orgs, Account Codes or Program Codes in Banner
- We are not creating or modifying E&G Funds in Banner
- Grants and Foundation Funds will still be created as needed
- Indexes and related Activity Codes can still be created as needed



Announcements & Deadlines

- Please be reminded that any employee not working onsite during normal business hours must have an approved Alternative Work Arrangement (AWA) form on file with Human Resources. **Failure to have a form on file goes against policy and may be grounds for disciplinary action.**
- Form located [here](#).



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.
- 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

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.

A square QR code with a black and white pixelated pattern, used for scanning to access online services.



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 are available!
- You can connect your personal LinkedIn account to your trainings taken at UofM to share what you've learned.
- Available in the [MyMemphis](#) portal.
- Keep in mind that LinkedIn Learning is a great resource to use especially on days where the University is under a modified work schedule due to inclement weather or any other reason.



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 Human Resources & 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. This form must be submitted 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 automatically 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.
- **December 2025 leave reports will be due early (December 21st) due to shift to Oracle.**
- **All outstanding leave reports for all months must be completed in order to transition away from Banner.**



Announcements & Deadlines

Next Online Training for *Effective Search Committees*:

- November 13, 2025, 10am
- Sign up in [Learning Curve](#)!



Announcements & Deadlines

8th Annual Excellence Awards

- November 11, 2025, at 10am
- University Center Ballroom



Announcements & Deadlines

2025 Career Milestone Awards

- Did you celebrate a Career Milestone in 2023 or 2024? Don't forget to select your gift!
- memphis.awardco.com (login with Single Sign On)
- Select from University of Memphis merchandise or shop Amazon through the Awardco platform!
- 2025 Career Milestone Recipients will be celebrated on March 6th, 2026. Save the date!



Announcements & Deadlines

Form I-9 Information

- Visit 178 Administration Building, M-F 9:00am-3:00pm for I-9 assistance. Appointments are not needed during these hours.
- HR is also offering I-9 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](https://twitter.com/uofmemphisbf)!
- Subscribe to our WorkforUM X (formerly Twitter) feed at [@umemphisjobs](https://twitter.com/umemphisjobs)!
- Follow us on Instagram! [@uofmhr](https://www.instagram.com/uofmhr)



See you next month!

Next Meeting: November 18, 2025 at *memphis.edu/fofhr*
Recordings & presentations available at *memphis.edu/focus*