SOAR Moves into the Build Phase

August 2024

We are excited to share that **SOAR**, the ERP (Enterprise Resource Planning) and HCM (Human Capital Management) transformation project, **has officially entered the Build Phase**.

This is a significant milestone in transforming our administrative operations and is where the blueprint of our new financial, procurement and human resources systems comes to life.

Why This Matters to You

Bringing Ideas to Life. The transition to the **Build Phase** signifies that we are moving from **planning and design** to actual **development**. This is the first step in seeing our efforts **materialize into a working system**, the ideas we have been discussing start to become a reality.

Designed for UofM. As the team sees UofM business processes conducted in the new system, Oracle Cloud, tweaks and adjustments, **called configurations and customizations**, will be made. This is crucial for **maximizing the system's effectiveness** and **achieving our goals**.

Data Integrity. The team will **practice moving UofM data** from our current systems to Oracle Cloud. This allows the team to see the system design with real UofM data aiding in **determining if the system design is meeting our needs** and will help **prepare the team** for the data migration in advance of our **go live date of July 1, 2025**.

> **We are excited about the progress we are making and are looking forward to planning system sneak peeks in the coming months!**

WORKSTREAM HIGHLIGHT

The SOAR project is made up of several workstreams with team members representing various units and departments across campus. Here, workstream leads share updates on their ongoing work.

Human Capital Management (HCM)

Oracle HCM (Human Capital Management) delivers human resource applications and cloud technology to streamline workforce management, including employee self-service, to streamline and control HR-related approval processes and deliver overall process enhancement.

Onboarding
The action or process of integrating a new employee into an organization.

Journey
Guided, personalized experience that streamlines the process for employees to find and complete actions.

Candidate
An individual seeking employment in a role.

Pre-Boarding
Conduct pre-hire activities such as compiling relevant paperwork for new hires entering any applicable scheduling data into the system and coordinating first day logistics.

Onboarding Journey

Current: UofM Hiring Checklist - Series of informational documents and processes for a new employee to complete across various systems.

Future: Onboarding processes will become streamlined into **one system for all hires.**

All hires, faculty, staff, student and temporary employees, will begin at the **same starting point** and follow a **unique, complex journey depending on the type of hire**. Internal and external hiring will follow separate journeys.

The pre-boarding and onboarding process will **automatically initiate** when the candidate is moved to pre-hire and the pending worker record gets created. The new hire will receive a journey assignment to complete pre-boarding prior to Day 1. In the following 90 days, the new hire will complete the onboarding journey.

Candidate ⟶ Employee

Recruiting	Pre-Boarding	Onboarding	New Hire Activities Complete
Candidate Accepts	Day 1 Activities	First 90 Day Activities	

Project and Grants Management (PGM):

Project Portfolio Management (PPM) projects generally have a designated start and end date, are supported by multiple funding sources and may cross fiscal years. PPM projects will be used to manage **sponsored research**, **faculty portfolio funds and capital projects**.

Cayuse will continue to be utilized in conjunction with the new system. Cayuse numbers will be fed directly into Oracle Cloud.

> For more information about what's changing with PGM and POETAF:
> **Visit the SOAR Resources Hub**

Enterprise Performance Management (EPM):

$$$ Delivers **budget** and **reporting applications** designed to plan and forecast.

Current: Financial, Workforce Planning and HCM are accessed through multiple systems and processes.

Future: Position budgeting and financial budgeting will be contained within one platform. **Financial**, **Workforce Planning** and **HCM** will all be accessed and connected through Oracle. Looking ahead, please ensure your yearly budget data is as clean as possible as we anticipate this transition.

Procure to Pay (PTP):

Current: Vendors are loaded into multiple systems to track invoices and contracts.

Future: **All vendor information will be accessed through one module**, including but not limited to: PO, encumbrances, purchases, contracts and incomes. These documents will be housed in and accessible through the system.

During the Imagine Phase...

- **60+ Key Design Decisions**
  A critical choice made during the design process that influences overall direction and system functionality.

- **150+ Design Workshops**
  Collaborative sessions focusing on specific aspects of system design.

- **2500+ User Stories**
  Keeping our people at the center of design.

- **900+ Hours of Workshops and Strategic Meetings**

Looking Ahead: Build Phase

Configuration and Build Phase consists of **4 iterative sprints** which allows for frequent review and validation of system functionality.

The **scope and complexity** of the build phase is **reflected in the 2500+ user stories** collected during the design workshops.
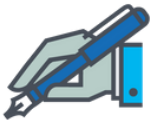
Click here to view the SOAR Website

See a detailed look at what's changing, view recorded sessions and get the most updated information about SOAR.

Sign up for SOAR Insiders Email List

To get more information about SOAR in addition to the website and newsletter, sign up for SOAR Insiders!

Click here to view the Chart of Accounts (COA) and POETAF Readiness Session

During the Imagine Phase, workstream leads led a Readiness Session and shared in-depth information on new Chart of Accounts (COA) and POETAF.