June 2024

IN THIS EDITION...

Did you know? We're in the **IMAGINE Phase** (see page 3)**!**

This month, we're shining the spotlight on the **Technical Workstream**. Learn about their efforts, key terms and definitions and how their efforts are propelling our transition to Oracle.

We want to hear from you! Please take a minute to submit the **SOAR Survey** (see page 5)**.**

Check out our website for resources including Town Hall recording, important project information and upcoming events.

ORACLE CLOUD

UofM selected **Oracle Cloud**, an integrated suite of applications, for our administrative operations, enabling a single ecosystem to manage and automate **financial**, **grants management** and **human resources business processes**.

Number of Systems Consolidating in Oracle Cloud:

ERP/Finance	EPM	HCM
6	**2**	**9**

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.

Technical Workstream

The **Technical Workstream** maintains the design and definitions of infrastructure, software architecture, integrations, coding, data conversion, reporting and computing environments.

What is a Boundary System?

A boundary system is 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.

To achieve this goal, some systems will be retrofitted, while other systems will be integrated with the use of middleware integration tools. This team will also utilize multiple techniques throughout the implementation process - examples below.

Retrofit

Organizing data that is currently in Banner to move to Oracle Cloud.*

Middleware Integration Tools

A third party tool that allows you to connect two or more applications.

Data Mapping

Identifying HR and Finance data elements in Banner ERP and connecting them to equivalent Oracle modules.

Data Conversion

Migrating information from one system to another.

Connectivity Testing

Continually running tests to ensure the accuracy and quality of the data transfer.

* The Technical Workstream is working with a trusted partner, Strata Information Group (SIG), to assist with developing scripts for the data conversion process.

Connectivity testing between boundary systems and Oracle Cloud will begin November 2024 & continue through Go Live in 2025.

IMAGINE PHASE

PROJECT UPDATES

What is the Imagine Phase?

The Imagine Phase of SOAR includes Design Workshops, COA Mapping, and Data Design and Quality Control. The purpose of the Imagine phase is to understand pivotal moments within the user journey to imagine an optimal digital experience.

This phase focuses on building a robust understanding of the User Story and Persona of those involved in this project to execute an effective implementation, concluding in August.

The team has attended
over 100
Design Workshops thus far!

Design Workshops

System workshops informing the SOAR team of Oracle applications, design options, and process steps.

Persona

Identifying key elements of an individual's experience while interacting with a process, service or product.

User Story

Captures the who, what, and why of the user experience to inform the project team in making decisions.

IMAGINE PHASE

Procure to Pay (PTP): Several processes will be streamlined through several key improvements! Purchases under $10,000 will flow through with fewer roadblocks. Faculty and staff will have the ability to submit and reconcile all expenses - travel, P-Cards and reimbursements - in one unified system. Additionally, RFP processes will be optimized with automated workflows for better committee experience. Contract monitoring and routing forms are integrated into the procurement system. The team is building more punchout catalogs for smoother purchasing.

Security and Controls: Security and Controls Workstream began their processes of creating a security plan and system roles for our software-ensuring only the right people can see and use data, information, transactions and reports in Oracle Cloud.

Projects and Grants Management (PGM):
The POETAF account string is used to charge expenditures to projects in Oracle's PGM subsidiary ledger. To code transactions to the PGM subsidiary ledger the POETAF must be provided.

The **POETAF** acronym stands for the following:
- **P**roject Number
- Expenditure **O**rganization
- **E**xpenditure Type
- **T**ask Number
- **A**ward Number
- **F**unding Source

Project and Grants Management (PGM) will be used for projects that are too complex to be managed by the General Ledger (GL) only, including projects that are often supported by a contract with a more granular budget and, in the case of sponsored awards, third-party invoicing. PGM projects generally have a designated start and end date, are supported by multiple funding sources, and may cross fiscal years, such as capital projects, sponsored research and faculty portfolio funds.

Please take a moment to complete the **SOAR Survey**! With your perspective, we will continuously shape our strategy to execute a successful program.

TAKE THE SURVEY

RESOURCES

To view the most recent Town Hall and access additional information regarding the SOAR program: **visit SOAR.Memphis.edu.**

THANK YOU!