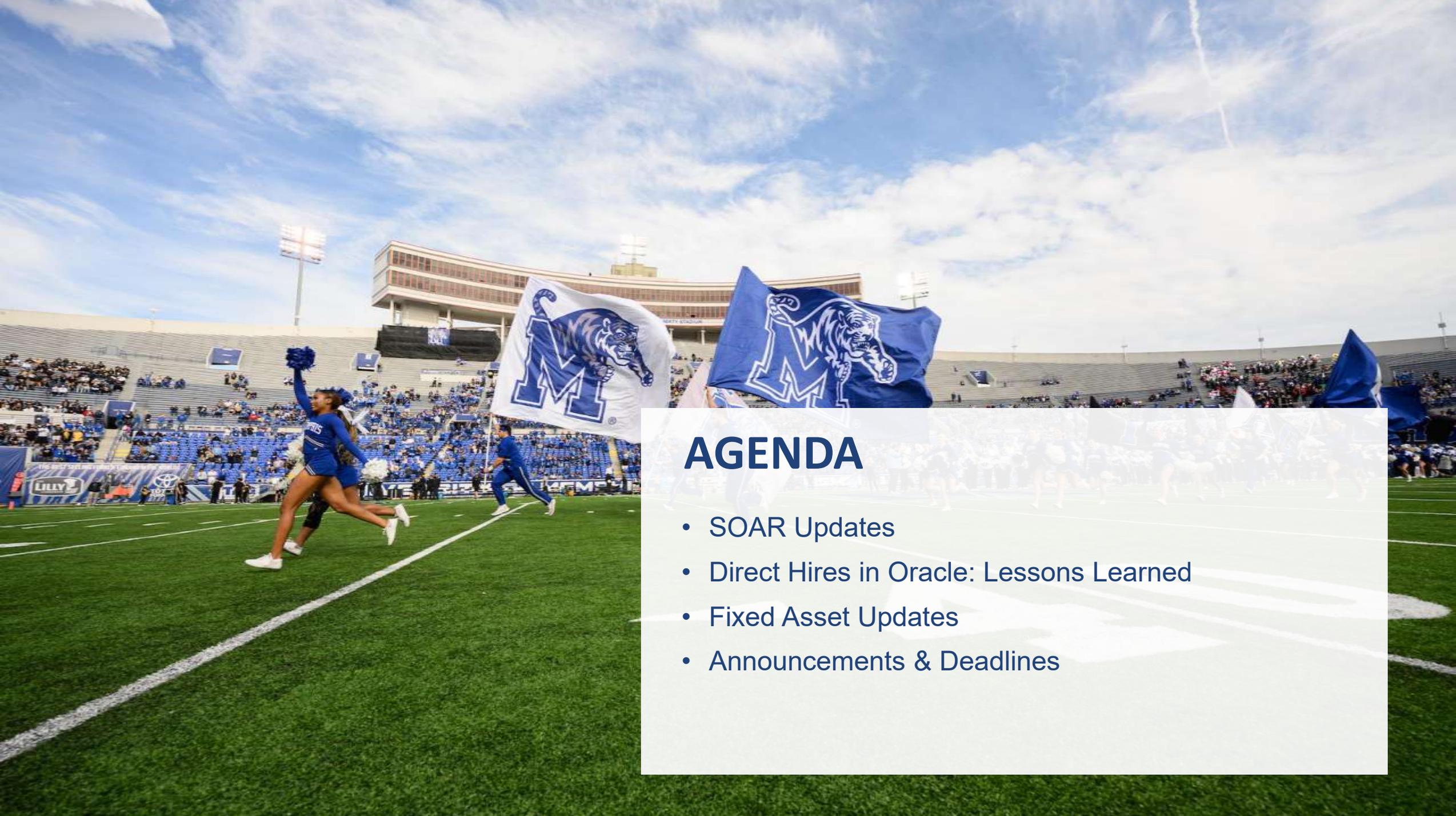




FOCUS ON FINANCE & HR

February 17, 2026



AGENDA

- SOAR Updates
- Direct Hires in Oracle: Lessons Learned
- Fixed Asset Updates
- Announcements & Deadlines

SOAR Updates



Shundra White-Helton, ITS



Oracle Fusion is now A-LIVE

- We've seen issues with the following
 - General, "What do I do" questions
 - Security-related errors
 - Conversion/Data Quality
 - Delays in Boundary System/Integration



General Oracle Fusion Questions

- Trouble Logging In
- People reported: I can't login (error message) or I'm logged in but missing tiles
 - On campus vs. Off campus
 - Must use UofM **VPN** when off campus
 - May need to change browser setting
 - Mobile devices (tablets, phones, etc.) cannot be used to access Oracle
 - Faculty on PDA (Professional Development Assignment) may have a limited set of Dashboard options due to their employment status
- Always get a screenshot or record a Teams video and attach to the Service Desk ticket. You can also email umtech@memphis.edu .



General Oracle Fusion Questions

- What we've learned:
 - Direct Hire process (finding your contract, identifying the error)
 - Time Cards (new submission dates, attestation, importance of line manager, there's no email)
 - Updating a person's role to reduce barriers to access issues
 - For access to EPM, Business Officers should submit a ticket on behalf of the employee
 - Login using the portal
 - umApps is a viable, alternate solution to access Oracle when off campus
 - When searching people within Oracle, different modules require different search criteria
 - Full-time employees will automatically receive access to Expenses. Others who need it should submit a ticket with the full COA to HR
 - Some Vendors/Suppliers are having difficulty setting up, maintaining and/or accessing their account
 - Line manager access cannot be transferred to another individual. To correct approval routing, a new contract must be created with the appropriate line manager assigned in the org chart

More we've learned



- Effort Certification
 - Positions allocated to the E&G with the Research Program code no longer require Effort Certification
- How to find crosswalk
 - To find your COA: Access the UofM Portal (MyMemphis) select Finance > Oracle Reference Information > Finance Program Guide. Select **Banner Index to Oracle** or **Banner Account to Oracle** to view the Excel file. Use CTRL + F to find your department info.
- Travel expense Reimbursement for employees and non-employees
- When it comes to University of Memphis Foundation:
 - Departments do not put in journal entries for Entity 30, only the Foundation is allowed to use this
 - For UMF Grants and Professorships, these are still handled by Grants Accounting
 - For direct reimbursements start with Softdocs form
- Do you have a request for an additional/different COA item?
 - We have received your request. Remember, we have a COA Governance team that will need to review and approve any request.
 - For ORG codes, additional approval in addition to COA Governance is required.

Security-related Errors

Security-related errors look like this:

A screenshot of a web browser displaying an 'Address' form in Oracle Applications Cloud. The form includes fields for 'Country' (United States), 'Type' (Home Address), and 'When does this address change over?' (01/07/2026). Below the form, there are two error messages: a red one stating 'Permission is required to access the address region' and a yellow one stating 'Some address parts are missing or incorrect' with a list of specific errors related to ZIP codes and geospatial coordinates. A 'Cancel' button is visible at the bottom right.

A screenshot of the Oracle Applications Cloud sign-in page. The page has a dark header with the text 'Sign In Oracle Applications Cloud'. Below the header, a red error message is displayed: 'ErrorSystem error. Please re-try your action. If you continue to get this error, please contact the Administrator.'

A screenshot of the Oracle Applications Cloud sign-in page. The page has a dark header with the text 'Sign In Oracle Applications Cloud'. Below the header, a red error message is displayed: 'ErrorAuthentication failed.'



Inquire on Detailed Balances

Inquire on Detail Balances Saved Search Entity 10

Search

* Ledger or Ledger Set	UofM Ledger US	* Scenario	Actual	* Program	All Program Values
* From Accounting Period	Feb-25	* Entity	10	* Activity	All Activity Values
* To Accounting Period	Feb-25	* Fund	110001	* Initiative	All Initiative Values
* Currency	USD	* Organization	All Organization Values	* Future	All Future Values
* Currency Type	Total	* Account	All Account Values		

Search Results

Demo by Heidi Kendall



Boundary Systems Integration

- Fifty boundary applications
 - Banner Student Refunds (GURFEED)
 - Collegiatelink
 - EContract
 - Edison
 - EMPOWER
 - Library Systems
 - TIAA
 - TigerCopy & Graphics



What does success look like?

Large ERP go-lives tend to follow a predictable pattern.

Most organizations experience:

- 300–1,000+ tickets in the first month for mid-to-large institutions
- 1,500–3,000+ tickets for very large or highly customized deployments
- 50–150 major issues (larger defects, integration failures, security or data-conversion problems)

The University of Memphis would be described as a High Complexity Organization

High Complexity Organization Description: Large institutions with multiple integrations, custom workflows, and heavy data conversion.

Our Success – First 30 Days



• Industry Benchmarks

- 300–1,000+ tickets for mid-to-large institutions
- 1,500–3,000+ tickets for highly customized deployments
- 50–150 major issues (larger defects, integration failures, security or data-conversion problems)
- The University of Memphis would be described as a High Complexity Organization

• University of Memphis Go-Live Footprint

- 156 general Oracle access tickets
- 1007 Oracle Workstream Tickets
- Less than 50 major incidents
- High Complexity Organization
 - Over 50 integrations
 - Custom workflows
 - Data conversion



QUESTIONS?



Direct Hires in Oracle: Lessons Learned



Danny Linton, Human Resources



Direct Hires in Oracle: Lessons Learned

- Since going into production on January 5, 2026, 2500+ line items have been processed in the Direct Hire Transaction Table.
- About 11% of those line items errored out.
- Understanding Oracle errors—and how to prevent them from occurring in the first place—will be a key training point as we continue to use the new system.



Direct Hires in Oracle: Lessons Learned

- A new web page has been created to house all information related to direct hires, including training videos and explanations of what Oracle's sometimes-mysterious error messages really mean.
- <https://www.memphis.edu/hr/directhire.php>
- Online trainings on this page are going to be re-recorded.

Most Common Issues

- The most common error we have seen across all Oracle modules is the employee not being signed in to the University's VPN.
- Departmental LSPs can assist with getting employees on the VPN.
- vpn.memphis.edu





Most Common Issues

- In the legacy version of e-contracts, any University employee could start an e-contract.
- In Oracle, access to the Hiring functions is more limited.
- Some departments have requested access and these requests will be reviewed, but are being treated as lower priority for now. Please lean on others in your department who do have access for now.



Most Common Issues

- Each level of approval receives an email when it's their turn to approve. An Outlook search of “**FirstName LastName**” will find the message. You may want to set up an Outlook rule to catch these.
- Approvers may also go to **Hiring > Direct Hire Workspace** instead of going thru an email.
- The levels of approval after submission are:
 1. Line Manager (selected on the direct hire; the initiator and the line manager can be the same person)
 2. Line Manager's Manager
 3. Graduate School (graduate assistant contracts only)
 4. Grants & Contracts (grant/project-funded hires only)
 5. Financial Aid (student worker & graduate assistant hires using federal work study funds only)
 6. Human Resources
 7. Human Resources AVP (temporary employees only)



Most Common Issues

- One of the most common (and easiest) errors to make is using service dates that Oracle cannot accept.
- Any employee with an active assignment **CANNOT** be hired with a start date before the start date of that active assignment.
 - **EXAMPLE:** If John has an active assignment that started 2/1, a second assignment can only start 2/1 or later, no earlier.
- If an employee has **ONLY INACTIVE** assignments, their next start date can only be **AFTER** the termination date of their latest contract.
 - **EXAMPLE:** If John has 5 inactive assignments and the last of them terminated on 1/31, any rehire assignment can only begin 2/1 or later.



Most Common Issues

- The Payment Rate field on the Direct Hire form can only accommodate digits and a decimal point.
 - ACCEPTABLE:
 - 100
 - 100.
 - 100.00
 - NOT ACCEPTABLE:
 - \$100 (dollar sign)
 - 100.OO (letter O instead of zeroes (0))
 - 100/month (text)
 - 100:00 (colon)
- We have added error checking for this on the direct hire form.



Most Common Issues

- The Salary Basis field is crucially important to be accurate. The Salary Basis determines the frequency the indicated salary will be paid.
- Student Workers and Temps are ALWAYS Hourly 1950.
- Part-Time Faculty are ALWAYS Monthly 12.
- Non-Exempt Graduate Assistants are ALWAYS Hourly 1950.
- Exempt Graduate Assistants (Non-Work Study) are ALWAYS Monthly 12.
- Exempt Graduate Assistants (Work Study) are ALWAYS Federal Work Study Program.
- Faculty Summer Comp is always Summer Comp.
- One Time Pay is ALWAYS One Time Pay. THIS IS THE MOST COMMON ERROR!
LATE BREAKING NEWS: This Salary Basis now defaults to One Time Pay!



Most Common Issues

- If you are hiring a student, Banner Student will be queried as part of your direct hire process. If that student does not have valid information in Banner Student, that can lead to issues with your contract.
- Do all you can to ensure that your student has a valid U.S. address, including ZIP code, in Banner. Also having an SSN is helpful though not technically required any longer for contract creation.
- Comments, Duties Descriptions, and Payment Formula text entries should be somewhat brief. There is a 400-character limit in the Comments and Duties Description fields. The Payment Formula is limited to 80 characters. **LATE BREAKING NEWS: These fields now only allow the maximum number of characters.**
- Always fill out the duties and formula fields with the required information... don't leave blank to avoid having the action rejected! Be concise but not too concise!



Most Common Issues

- For years, when there was an error or change needed on an e-contract, we always told you to “cancel and enter a new contract.”
- At the launch of Oracle, we encouraged you to do the same thing, but now we are learning that this might not be the best advice. Oracle requires an effective date on a terminated record, and that prevents you from re-using that date as the start date on your replacement contract.
 - EXAMPLE: Jerry’s grad assistant contract ran from 1/1 to 4/30. It gets terminated so it can be resubmitted with updated info. The 1/1 termination date takes 1/1 off the table as a start date, so 1/2 must then be used, which may not be accurate.
- If possible, HR will work with you to modify the existing assignment, depending on what it is that needs to be changed.
- Submit a helpdesk ticket for this type of change.



Most Common Issues

- In the Chart of Accounts fields, only complete the fields that are relevant for what you are paying for.
 - EXAMPLE: Grad assistant contracts on work study would require a CWSP value in the Stipend COA box, but not the Tuition COA box, because Work Study pays for wages, not tuition.
 - EXAMPLE: If you're using a Project and Task, you must complete both fields. If you're NOT using a Project and Task, leave both fields blank.



Most Common Issues

- If you need help with a Direct Hire, please enter a helpdesk ticket at <https://umhelpdesk.memphis.edu> so it can be tracked and worked in the order it was received.
- Sending individual emails to various HR employees can lead to issues getting missed. Helpdesk tickets will ensure every issue is triaged.



The Future

- We are working on adding more error checking and pre-entry help information so that future direct hires are easier on the departments (and the approvers)!
- PLEASE use the Oracle Guided Learning tips (the little question marks) above each field. Most of these tell you exactly what each field is looking for.

Additional Details

Start Date * ? <input type="text"/>	Projected End Date * ? <input type="text"/>	Job * ? <input type="text"/>	Person Type * ? <input type="text"/>
Salary Basis * ? <input type="text" value="One Time Pay"/>	Salary Component * ? <input type="text"/>	Payroll * ? <input type="text"/>	Payment Amount * ? <input type="text"/>
Working Hours * ? <input type="text"/>	Line Manager * ? <input type="text"/>	Department * ? <input type="text"/>	Location * ? <input type="text"/>



QUESTIONS?

Fixed Asset Updates



- **Annual Equipment Inventory Confirmation**
- **Lost and Stolen Property**

Latrena Jones, Financial Reporting



Annual Inventory Confirmation

- Annual Inventory Confirmation is a required procedure: [BF4025 Policy](#)
- Maintaining accurate and up-to-date records of your department's equipment inventory is essential to ensuring proper accountability by the University as a whole.
- State and Internal Auditors review inventory confirmations as part of their routine audit procedures.
- From February 20th to February 27th, 2026, the FA Accounting team will send Inventory Reports of capital and sensitive equipment to Equipment Reps and Financial Managers.



Fixed Assets Categories

- **“Capital Equipment”** is a single item costing **\$5,000** or more.
- **“Sensitive Minor Equipment”** has a cost of more than \$1,500 and less than \$5,000 and is particularly vulnerable to theft. Equipment in this category must be tagged. (*cameras, computers, audio and video equipment, microscopes,, and other scientific equipment.*)
- **“Controlled Equipment under \$1,500”** is also considered vulnerable to theft and has been tagged—at the department’s discretion.

Per policy, “departments should take every precaution to safeguard ALL state property, regardless of cost.” Therefore, we strongly recommend and encourage responsible parties to inventory and confirm “Sensitive Minor Equipment” and “Controlled Equipment under \$1,500” when confirming “Capital Equipment”. Confirmation of non-capital equipment should be maintained internally by the department.

Confirmation of capital equipment must be completed and submitted to wf-fixed-assets@memphis.edu.

Annual Inventory Confirmation Process

Department Responsibilities & Required Actions



Forms to Expect

- Annual Inventory Confirmation Form (Excel, PDF)
- Equipment Confirmation < \$5,000 Form (Excel, PDF)
- Items in Department - Not on Inventory Form (Excel, PDF)
- Transfer / Disposal Request Form (Excel, PDF)

Upon completion of the forms, please forward the **signed** confirmations to wf-fixed-assets@memphis.edu by Tuesday, March 31, 2026.

Annual Inventory Confirmation Process

Department Responsibilities & Required Actions



- **Print and Review**

Print the confirmation report and carefully review it.

- **Physically Verify Assets**

Physically confirm the location of every asset listed.

- **Update Missing or Incorrect Information**

If asset details (description, make, model, serial number, location, etc.) are incorrect or missing:

- Clearly mark corrections on the confirmation report (use red ink or red font).
- The Fixed Asset Accountant will update Oracle based on your noted changes.

- **Zero-Value Assets**

Identify any zero-value assets that should be added to surplus.

Annual Inventory Confirmation Process

Department Responsibilities & Required Actions



- **Off-Campus Equipment**

For items listed as “Off Campus,” confirm that an Off-Campus Use/Return of University Equipment form has been completed and submitted to the Fixed Asset Accountant.

- **Transferred Equipment**

If equipment has been transferred to another organization, provide details on the Transfer Request Form.

- **Adding Capital Equipment**

To add capital equipment not listed, complete the Items in Department Not on Inventory form and submit it with your inventory confirmation.

Please send all documents and updates to [*wf-fixed-assets@memphis.edu*](mailto:wf-fixed-assets@memphis.edu)

Annual Inventory Confirmation Process

Department Responsibilities & Required Actions



Lost or Stolen Equipment

- Employees should notify their supervisor immediately.
- Complete a Report of Lost or Stolen Property form.
https://www.memphis.edu/accounting/pdf/lost_stolen_property.pdf
- Submit to Police Services and Copy the Fixed Assets Team
police@memphis.edu / wf-fixed-assets@memphis.edu
- Notify ITS if the item is an electronic device.

Upcoming Transition: This form will be incorporated into the Oracle workflow in the near future. Additional details will be shared following implementation.



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

Campus Cleanout

- Shred and Recycle | Student Plaza | March 12 | 9am – 2pm
- Surplus Exchange | Rose Theatre (RM 115) | March 11 & 12 | 9am – 2pm
- More info at <https://www.memphis.edu/bluegoesgreen/campuscleanout.php>



Announcements & Deadlines

- New Chart of Accounts (COA) strings may now be requested as Oracle has gone live.



Announcements & Deadlines

- Check your org charts!
- Now that Oracle is live, please review your org charts for accuracy; having the correct line manager is more important than ever.
- If you have changes, you may submit them to HR via a helpdesk ticket (for now) or do a Request for Position Change action in Oracle. You must have the Workforce Structures tiles to do this.

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 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

New Employee Injury Reporting Has Launched!

The updated reporting system is now live, and all existing links at:

- https://www.memphis.edu/ehs/report_an_incident will automatically direct you to the new online form.

In addition to the Employee Injury Report, new online forms are now available for:

- Near Miss
 - Student Injury
 - Visitor Injury
 - Lab Student Injury
-
- QR codes will be posted in relevant areas across campus to make reporting quicker and easier.
 - Please note: all forms are now fully online and cannot be printed or submitted via email.
 - For questions or assistance, contact ehs@memphis.edu or call 901.678.5700.



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 must 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

- In Oracle, employees may start their own separation process by going to Me > Show More > Resign from Employment.
- The resignation action will route to the line manager and then to HR.
- Resignation letters may be attached to these actions.
- 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.



Announcements & Deadlines

- PLEASE make sure that all time cards for your department are submitted and approved each month!
- All exempt staff and faculty employees will report any leave taken on their time cards.
- All non-exempt employees will report their time worked on their time cards. Due dates for non-exempt time cards have not changed.
- Please use the Absences module in Oracle to request leave in advance.
- In Oracle, exempt employee time cards are due by the 20th of the month being reported.
- If changes are needed after the 20th of the month, the employee or line manager may edit timecards after they have been approved.



Announcements & Deadlines

Online Training for *Effective Search Committees*:

- Available 24/7 in Oracle Learn!
- Me > Learning > Learning Catalog > Enroll



Announcements & Deadlines

Employee Recognition is Easy With an Updated Tiger Spotlight Program!

- You can recognize staff or faculty anytime with a Tiger Spotlight Award!
- Simply fill out the brief form, select from one of the newly redesigned recognition certificates, and it will automatically be emailed directly to that employee and their supervisor.
- It's a quick and easy way to celebrate someone and let them know you appreciate their work!



A Job Well Done



Successful Outcome for Every Student



Thank You



Ascending



Announcements & Deadlines

2025 Career Milestone Awards

- 2025 Career Milestone Recipients will be celebrated on March 6th, 2026 at 10am in the UC Ballroom.
- Did you celebrate a Career Milestone in 2023 or 2024? Don't forget to select your gift in Awardco!
- memphis.awardco.com (login with Single Sign On)
- Select from University of Memphis merchandise or shop Amazon through the Awardco platform!



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 and workforum2.memphis.edu as well as in the Opportunity Marketplace in Oracle.
- Follow the Division of Business & Finance on X at [@uofmemphisbf](https://twitter.com/uofmemphisbf)!
- Subscribe to our WorkforUM X feed at [@umemphisjobs](https://twitter.com/umemphisjobs)!
- Follow us on Instagram! [@uofmhr](https://www.instagram.com/uofmhr)



See you next month!

Next Meeting: March 17, 2026 at *memphis.edu/fofhr*
Recordings & presentations available at *memphis.edu/focus*