# Talon Town Hall

April 23rd, 2025

# Agenda

- Opening Remarks
- Talon Project Update and Wins
- Absence Improvements and Demo
- Chart of Accounts Overview
- Training Summary
- Question and Answer

# Opening Remarks

**Dr. Phil Oldham**

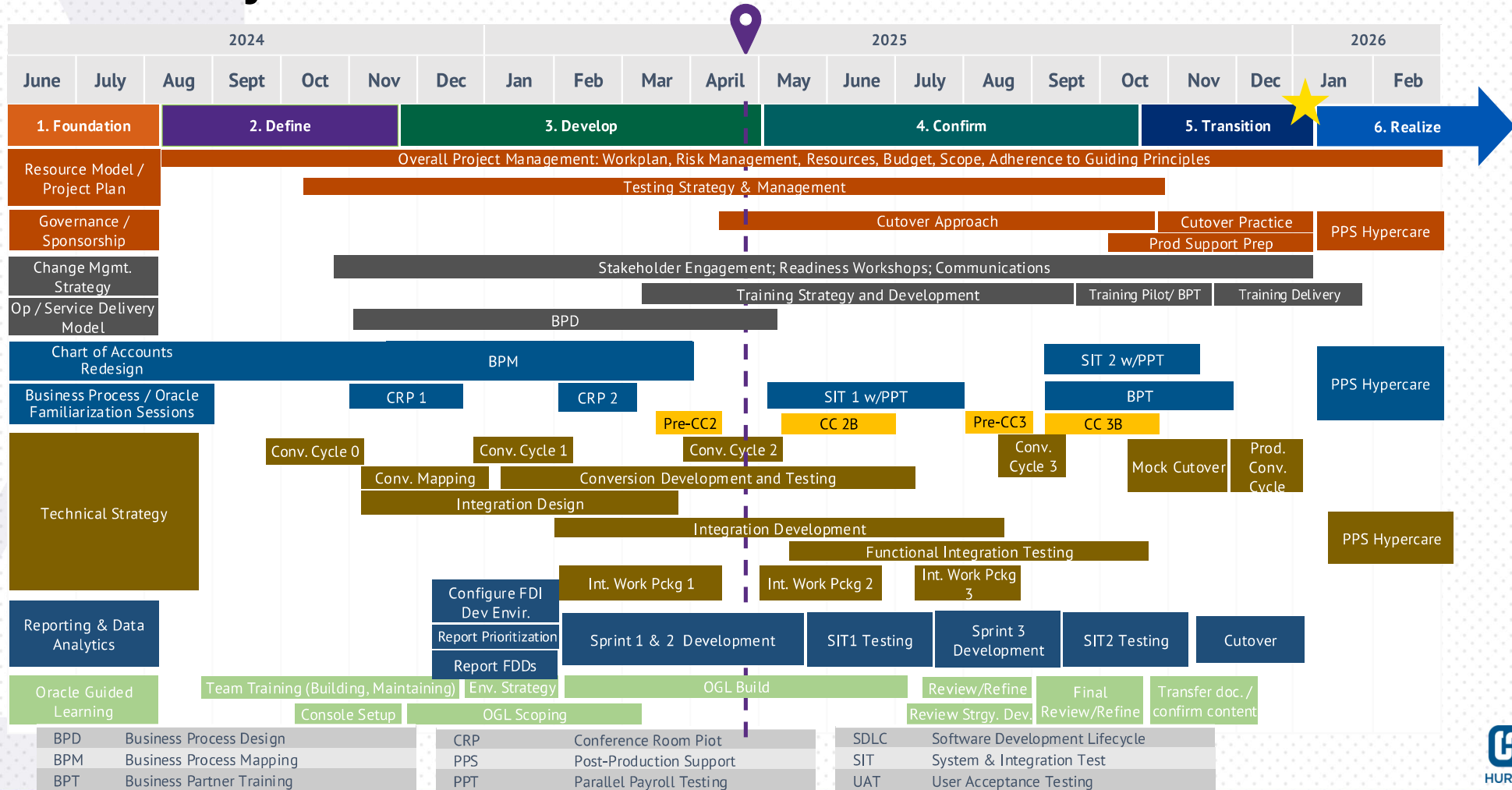*President*

# Opening Remarks – Dr. Stinson

# Opening Remarks

**Bill Anderson**

*Huron Consulting Group*

# Talon Project Timeline



| | 2024 | | | | | | | 2025 | | | | | | | | | | | | 2026 | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | June | July | Aug | Sept | Oct | Nov | Dec | Jan | Feb | Mar | April | May | June | July | Aug | Sept | Oct | Nov | Dec | Jan | Feb |

**1. Foundation** | **2. Define** | **3. Develop** | **4. Confirm** | **5. Transition** | **6. Realize**

Resource Model / Project Plan

Overall Project Management: Workplan, Risk Management, Resources, Budget, Scope, Adherence to Guiding Principles

Testing Strategy & Management

Governance / Sponsorship

Cutover Approach — Cutover Practice — Prod Support Prep — PPS Hypercare

Change Mgmt. Strategy

Stakeholder Engagement; Readiness Workshops; Communications

Op / Service Delivery Model

Training Strategy and Development — Training Pilot/ BPT — Training Delivery

BPD

Chart of Accounts Redesign

BPM — SIT 2 w/PPT

Business Process / Oracle Familiarization Sessions

CRP 1 — CRP 2 — SIT 1 w/PPT — BPT — PPS Hypercare

Pre-CC2 — CC 2B — Pre-CC3 — CC 3B

Conv. Cycle 0 — Conv. Cycle 1 — Conv. Cycle 2 — Conv. Cycle 3

Conv. Mapping — Conversion Development and Testing — Mock Cutover — Prod. Conv. Cycle

Technical Strategy

Integration Design

Integration Development

Functional Integration Testing

PPS Hypercare

Int. Work Pckg 1 — Int. Work Pckg 2 — Int. Work Pckg 3

Configure FDI Dev Envir.

Reporting & Data Analytics

Report Prioritization — Sprint 1 & 2 Development — SIT1 Testing — Sprint 3 Development — SIT2 Testing — Cutover

Report FDDs

Oracle Guided Learning

Team Training (Building, Maintaining) — Env. Strategy — OGL Build — Review/Refine — Final Review/Refine — Transfer doc. / confirm content

Console Setup — OGL Scoping — Review Strgy. Dev.

| BPD | Business Process Design | CRP | Conference Room Piot | SDLC | Software Development Lifecycle |
|---|---|---|---|---|---|
| BPM | Business Process Mapping | PPS | Post-Production Support | SIT | System & Integration Test |
| BPT | Business Partner Training | PPT | Parallel Payroll Testing | UAT | User Acceptance Testing |

# Exciting Changes with Talon

1. Integrated business system on a single platform

2. Employee onboarding process

3. Streamlined contracting process

4. Robust and intuitive reporting capabilities

5. Pay frequency

6. Oracle Guided Learning and end user training tools

7. Improved Chart of Accounts structure

8. Business Partner Network

# Absence Overview

**<u>Who will use Absence?</u>**

All employees eligible for leave such as Permanent Full Time Faculty and Staff

**<u>Who will not use Absence?</u>**

Non-Benefited employees such as Temporary employees, Students, Adjunct, etc.

# Absence Demo

# CoA: Segments and Definitions

| | | | | | | | Unspecified Value Entry Allowed | | | System Generated | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Name and Oracle Setup** | **Entity** | **Organization** | **Fund** | **Fund Type** | **Account** | **Functional Class** | **Program** | **Activity** | **Site** | **Future** | **Intercompany** |
| | • *Company Segment*<br>• *Primary Balancing* | • *Cost Center Segment* | | • *Secondary Balancing* | • *Account Segment* | | | | | | • *Intercompany Segment* |
| **Question** | Who? | Who? | How? | How? | What? | Why? | Why? | Why? | Where? | TBD | With Whom? |
| **Width** | 3 | 6 | 6 | 3 | 6 | 3 | 3 | 4 | 3 | 3 | 3 |
| **Definitions** | Identifies the major operational unit within the institution responsible for the transaction. | Represents the academic, administrative, or operating unit responsible for or affected by a given transaction. | Individual pot(s) of money that is budgeted for or funded and spent against. (tracks source and use) | High-level classification used to categorize and report on the overall restrictions and designation of the Fund (Net Asset Class) | Categorizes the nature of the transaction as a specific type of revenue, expense, asset, liability, or fund balance. | Used to designate the F&A cost / NACUBO classification or mission. Meaningful value required only for expenses. (current "Program") | Records transactions with a <u>formalized</u> set of on-going cross disciplinary or department activities. | Used to understand the costs and/or revenues generated by a particular activity or event. | Tracks revenue and expense activities to a specific operating location such as a building, campus, etc. | Configured and left blank for future use. | Recording off-set entity on due to and due from entries for cross-entity transactions. |

# Validations within the Chart of Accounts

## Related Value Set (RVS)

- Used to **manage dependencies between chart segments**.
- A segment's list of values displayed is based on the preceding segment selection.
- It's a mechanism to **ensure valid combinations** are used during data entry.

Think: **Proactive**!

**Examples**:
- Fund and Fund Type
- Organization and Functional Class

## Cross-Validation Rule (CVR)

- Defines a **value** of a particular segment that can be **combined** with specific values of other segments.
- Prevents the **creation** of combinations that **should not exist**.

Think: **Reactive**!

**Examples**:
- Functional Class 999 - Balance Sheet can only be used with asset, liability or net position Accounts (100000 through 400000).
- Expense transactions (accounts that start with a 6 or 7) must use a valid functional class (cannot be 980 or 999).

*Note: Both RVS and CVR rules are part of the CoA Validation services.*

# When will I be trained?

**BUSINESS PARTNER TRAINING**
*September 2025*

*WE ARE HERE*

*TALON GO-LIVE*

**1**

**2**

**3**

*January 2026*

**SPRING TOWN HALL**
*April 2025*

**END USER TRAINING (INITIAL)**
*October – December 2025 and ongoing thereafter*
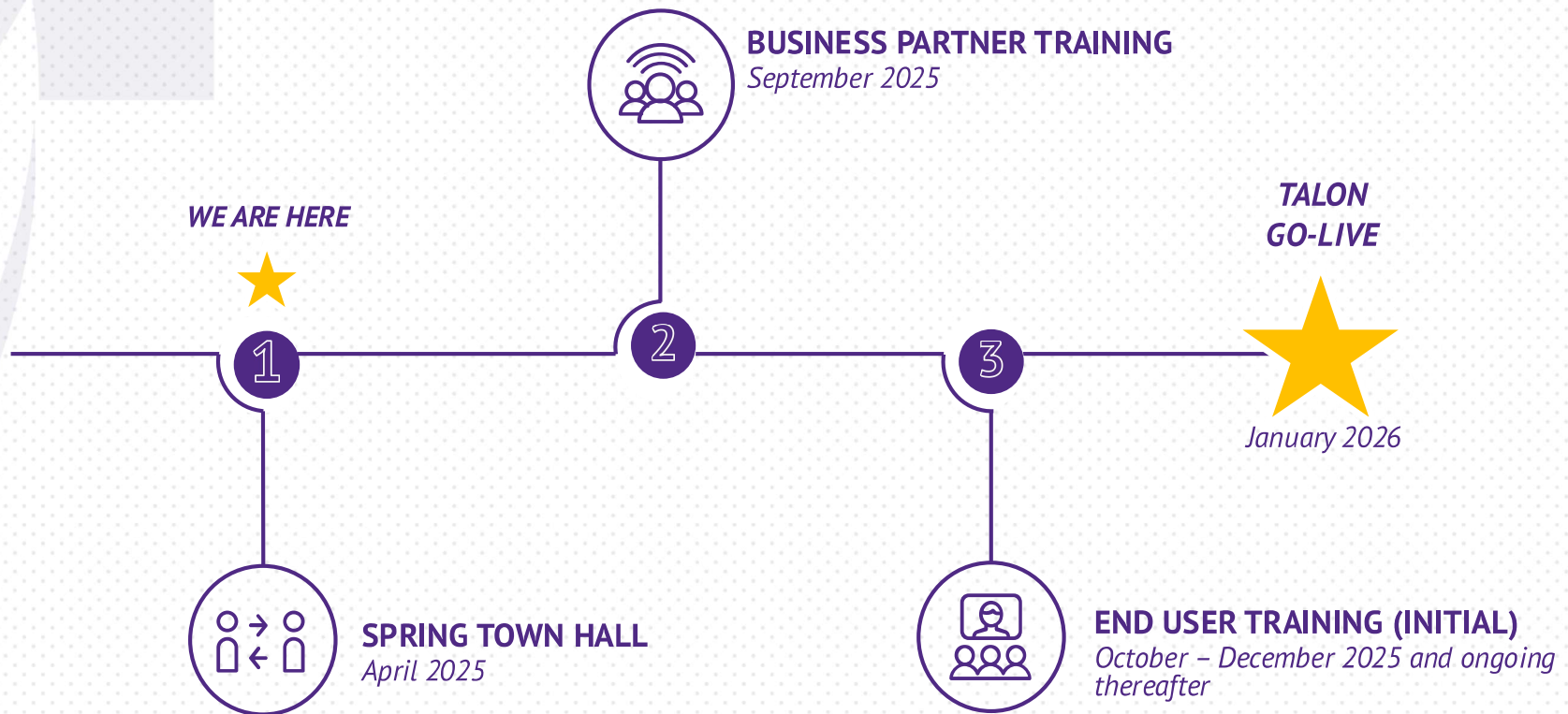
# How will I be trained?

### Quick Reference Guides (QRG)

Short step guides that provide a quick way to find information and instructions on a task.

### Videos

Short, 1–2-minute videos to provide a visual walkthrough of a task.

### Instructor-Led Trainings

Classroom-style sessions for in-depth training to explain and demonstrate processes and policies.

### Job Aids

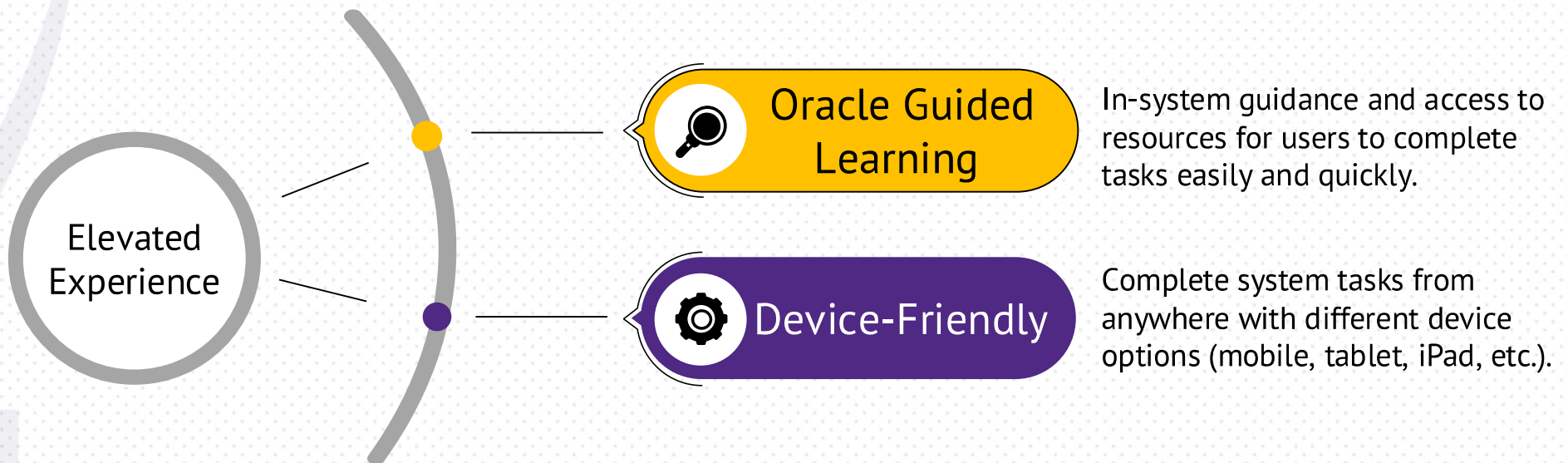Thorough step-by-step instructions guiding end users how to perform specific tasks and processes.

### Oracle Guided Learning
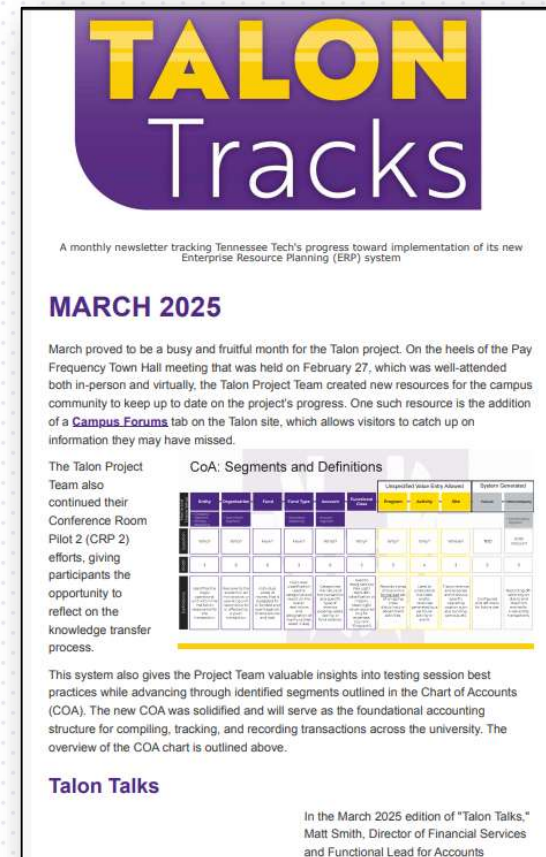
In-system tool that guides users through processes.

# Elevate Your User Experience

Leverage state-of-the-art technology to not only empower employees like you, but increase process efficiency to enhance your user experience.

Elevated Experience

**Oracle Guided Learning**

In-system guidance and access to resources for users to complete tasks easily and quickly.

**Device-Friendly**

Complete system tasks from anywhere with different device options (mobile, tablet, iPad, etc.).

# Where can I learn more?

- Visit the **Talon website** at tntech.edu/talon
- View our monthly **Talon Tracks** newsletter which includes project updates, featured team member spotlights, and much more
- Watch our monthly **Talon Talks** video, where each month we spotlight a Talon team member
- **Campus Roadshows** via Business Partners

# Questions?