

DAY ONE

DATE: TBD

Time	Session/Module	Key Objectives	HESS Institution Attendees
8:45 – 9:00	Drivestream & Oracle team Zoon Login, announcements and workshop Kick-off		
EXECUTIVE SESSION			
9:00 – 10:00	Executive Overview	<ul style="list-style-type: none"> ▪ Transformation to Cloud Strategy ▪ Readiness and Preparation ▪ Implementation Approach & Methodology ▪ Change Management Approach ▪ Factors that affect timeline & Cost ▪ Risk Factors and Mitigation 	<ul style="list-style-type: none"> ▪ Executive Sponsors ▪ Executive Stakeholders ▪ HR, ERP and IT Project Stakeholders
10:00 – 10:15	Break		
ERP / EPM SESSIONS			
10:15 – 11:15	General Ledger	<ul style="list-style-type: none"> ▪ Review BusinessProcesses <ul style="list-style-type: none"> ○ Ledgers, Legal Entities/Campuses, Chart of Accounts ○ Journal Transactions ○ Fund/Control Accounting ○ Period Close components ○ Financial Reporting and Analysis ▪ Discuss Integrations, Reports, and Conversions 	<ul style="list-style-type: none"> ▪ ERP Stakeholders ▪ GL SMEs ▪ Technical Stakeholders
11:15 – 12:15	Procurement/ Self-Service/ Supplier Portal	<ul style="list-style-type: none"> ▪ Review BusinessProcesses <ul style="list-style-type: none"> ○ Maintain Supplier Information ○ Supplier Contracts ○ Maintain Requisitions, Purchase Order and Receipts ▪ Discuss Security & Workflow ▪ Discuss Integrations, Reports, and Conversions ▪ Conversion – Open Purchase Orders 	<ul style="list-style-type: none"> ▪ ERP Stakeholders ▪ Procurement SMEs ▪ Technical Stakeholders
12:15 – 12:45	Lunch Break		
12:45 – 1:15	Payables	<ul style="list-style-type: none"> ▪ Review BusinessProcesses <ul style="list-style-type: none"> ○ Invoices ○ Payments ○ Taxes for Payable Invoices ○ AP-GL Reconciliation ▪ Discuss Security & Workflow ▪ Discuss Integrations, Reports, and Conversions ▪ Conversion – Open Invoices 	<ul style="list-style-type: none"> ▪ ERP Stakeholders ▪ Payables SMEs ▪ Technical Stakeholders
1:15 – 1:45	Grants/Projects	<ul style="list-style-type: none"> ▪ Review BusinessProcesses <ul style="list-style-type: none"> ○ Grants – pre-award to post-award ○ Grants – funding to close-out ○ Project Financials ○ Projects Reporting ▪ Discuss Security & Workflow ▪ Discuss Integrations, Reports, and Conversions 	<ul style="list-style-type: none"> ▪ ERP Stakeholders ▪ Project SMEs ▪ Technical Stakeholders
1:45 – 2:15	Revenue Management & Reconciliation	<ul style="list-style-type: none"> ▪ Review BusinessProcesses <ul style="list-style-type: none"> ○ Revenue/Receivables ○ Cash/Bank Reconciliation ○ Reconciliation Sources ○ Recon Rules ○ Reporting ▪ Discuss Security & Workflow ▪ Discuss Integrations, Reports, and Conversions 	<ul style="list-style-type: none"> ▪ ERP Stakeholders ▪ Receivables / Revenue Management SMEs ▪ Technical Stakeholders

Time	Session/Module	Key Objectives	HESS Institution Attendees
2:15 – 2:45	Fixed Assets	<ul style="list-style-type: none"> ▪ Review Business Processes <ul style="list-style-type: none"> ○ Fixed Asset – Key Structures ○ Add, Maintain and Retire Assets ○ Asset Depreciation ○ Report and reconcile assets ▪ Discuss Security & Workflow ▪ Discuss Integrations, Reports, and Conversions <ul style="list-style-type: none"> ▪ Conversion – Active Fixed Assets 	<ul style="list-style-type: none"> ▪ ERP Stakeholders ▪ Fixed Asset SMEs ▪ Technical Stakeholders
2:45 – 3:30	Expenses	<ul style="list-style-type: none"> ▪ Review Business Processes – Expenses <ul style="list-style-type: none"> ○ Employee Data ○ Cash Advances ○ Expenses & Payments ▪ Discuss Integrations, Reports, and Conversions 	<ul style="list-style-type: none"> ▪ ERP Stakeholders ▪ Expense SMEs ▪ Technical Stakeholders
3:30 – 4:30	EPM <ul style="list-style-type: none"> • Planning • Close & Consolidation 	<ul style="list-style-type: none"> ▪ Understand planning process ▪ Review application requirements <ul style="list-style-type: none"> ○ Review drivers, dimensions, etc. ▪ Understand Close & Consolidation processes <ul style="list-style-type: none"> ○ Consolidation process ○ Close checklist ○ Approvals ▪ HCM related topics <ul style="list-style-type: none"> ○ Workforce Modeling ○ Workforce Prediction ○ Strategic Workforce Planning 	<ul style="list-style-type: none"> ▪ ERP Stakeholders ▪ Business SMEs ▪ Technical Stakeholders

DAY TWO

DATE: TBD

HUMAN CAPITAL MANAGEMENT (HCM) SESSIONS			
Time	Session/Modules	Key Objectives	HESS Institution Attendees
8:30 – 10:00	Hire to HR <ul style="list-style-type: none"> • Recruiting • Onboarding • HR • Benefits 	<ul style="list-style-type: none"> ▪ Review Business Processes <ul style="list-style-type: none"> ○ Requisition/Offer Management ○ Candidate Management ○ Onboarding ○ HR Transactions ○ Benefits Eligibility ○ Life Events ▪ Discuss Security & Workflow ▪ Discuss Integrations, Reports, and Conversions 	<ul style="list-style-type: none"> ▪ HR Stakeholders ▪ Technical Stakeholders
10:00 – 10:15	Break		
10:15 – 11:30	Time Recording <ul style="list-style-type: none"> • Absence • Time & Labor 	<ul style="list-style-type: none"> ▪ Review Business Processes <ul style="list-style-type: none"> ○ Absence Plan ○ Work Schedules ○ Timecard Layout ○ Identify T&L Rules ▪ Discuss Security & Workflow ▪ Discuss Integrations, Reports, and Conversions 	<ul style="list-style-type: none"> ▪ HR ▪ Absence /T&L Stakeholders ▪ Technical Stakeholders
	Comp & Pay <ul style="list-style-type: none"> • Workforce Compensation • Payroll 	<ul style="list-style-type: none"> ▪ Review Business Processes <ul style="list-style-type: none"> ○ Comp Cycles ○ Individual Plans (Ex. Spot Award) ○ Total Compensation Statements ○ Earnings & Deductions ○ Exempt form and Direct Deposit ○ Garnishments ○ Tax Compliance ▪ Discuss Security and Payroll Flow ▪ Discuss Integrations, Reports, and Conversions 	<ul style="list-style-type: none"> ▪ Payroll Stakeholders ▪ Technical Stakeholders
11:30 – 12:00	Lunch		
12:00 – 1:45	Talent Management <ul style="list-style-type: none"> • Performance • Goals • Career Development • Talent Review • Succession Management • Learning 	<ul style="list-style-type: none"> ▪ Review Business Processes <ul style="list-style-type: none"> ○ Performance Templates ○ Performance Process ○ Goal Management ○ Succession Process ○ Learning Management ○ Courses ▪ Discuss Security and Workflow ▪ Discuss Integrations, Data Conversion and Reporting 	<ul style="list-style-type: none"> ▪ HR / Talent Management Stakeholders ▪ Technical Stakeholders
	Work & Life <ul style="list-style-type: none"> • Work Life Solutions • Health & Safety • Help Desk • Digital Assistant 	<ul style="list-style-type: none"> ▪ Review Business Processes <ul style="list-style-type: none"> ○ Competitions, Volunteering, and Reputation ○ Health & Safety Recording ○ HR Case Management ▪ Discuss Security and Workflow ▪ Discuss Integrations, Data Conversion and Reporting 	<ul style="list-style-type: none"> ▪ HR Stakeholders ▪ Technical Stakeholders
1:45 – 2:00	Break		

STUDENT FINANCIAL PLANNING (SFP) SESSION			
Time	Session/Modules	Key Objectives	HESS Institution Attendees
2:00 – 3:00	Student Financial Planning	<ul style="list-style-type: none"> ▪ Review Business Processes <ul style="list-style-type: none"> ○ ISIR Processing ○ Student Information ○ Cost of attendance ○ Student Awards ○ Academic Term Structure ▪ Discuss Integrations and Reporting 	<ul style="list-style-type: none"> ▪ Financial Planning Stakeholders ▪ Technical Stakeholders
3:00 – 3:15	Break		

PROJECT PLANNING WORKSHOP			
3:15 – 5:15	Project Planning Workshop	<ul style="list-style-type: none"> ▪ Key Phasing Concepts ▪ Synergies between ERP & HCM ▪ Understanding Module Dependencies ▪ Review Scope Definition <ul style="list-style-type: none"> ○ Review Modules to be Implemented ○ Identify & discuss integrations ○ Identify & discuss Data Conversion ○ Discuss Change Management, Training Approach, Plan and Tools ○ Discuss Testing & Cutover approach ▪ Review Project Resourcing <ul style="list-style-type: none"> ○ Identify & discuss project roles and responsibilities ○ Identify key team members and their locations ○ Project Team organization ▪ Discuss Timeline <ul style="list-style-type: none"> ○ Go Live Date ○ Conflicting Business as Usual Priorities ○ Blackout Dates ○ Internal/External System Dependencies ○ Other Conflicting Projects 	<ul style="list-style-type: none"> ▪ Key Project Stakeholders
5:15 – 5:30	Wrap-up and next steps		