



# Enterprise Performance Management

Planning & Reporting Software



**May 2026**

Kickoff Meeting

## Purpose of Today's Meeting

- This kickoff meeting establishes a shared understanding of Oracle Enterprise Performance Management and how it will improve our budgeting processes.
- We will define clear roles for budget managers and budget assistants to ensure everyone knows their responsibilities in the new system.
- You will leave today with realistic expectations for implementation timelines, training support, and what happens next.

# Enterprise Performance Management

## Planning & Reporting Software Implementation

Jacksonville State University has evaluated Oracle EPM Planning & Reporting to modernize financial planning, enhance forecasting accuracy, strengthen reporting capabilities, and reduce the manual effort currently required in budget development and analysis. The solution will support a more agile, data-driven financial management environment aligned with institutional strategic goals.

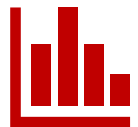
Oracle EPM Planning & Reporting will provide with a modern, integrated financial planning system that enhances accuracy, transparency, and strategic decision-making. By leveraging the existing Banner Financial ERP data, Oracle will facilitate automation, predictive analytics, scenario planning, structured reporting, and seamless integration with other campus systems. The EPR platform is positioned to significantly strengthen the institution's annual budgeting, forecasting, workforce planning, and institutional reporting processes.

## WHY IS JAX STATE IMPLEMENTING ORACLE EPM?



### **Improved Forecast Accuracy & Decision-Making**

Oracle EPM leverages predictive analytics and real-time data to produce more reliable budgets, forecasts, and multi-year projections. This supports executive leadership in evaluating financial viability under varying enrollment, economic, and resource conditions.

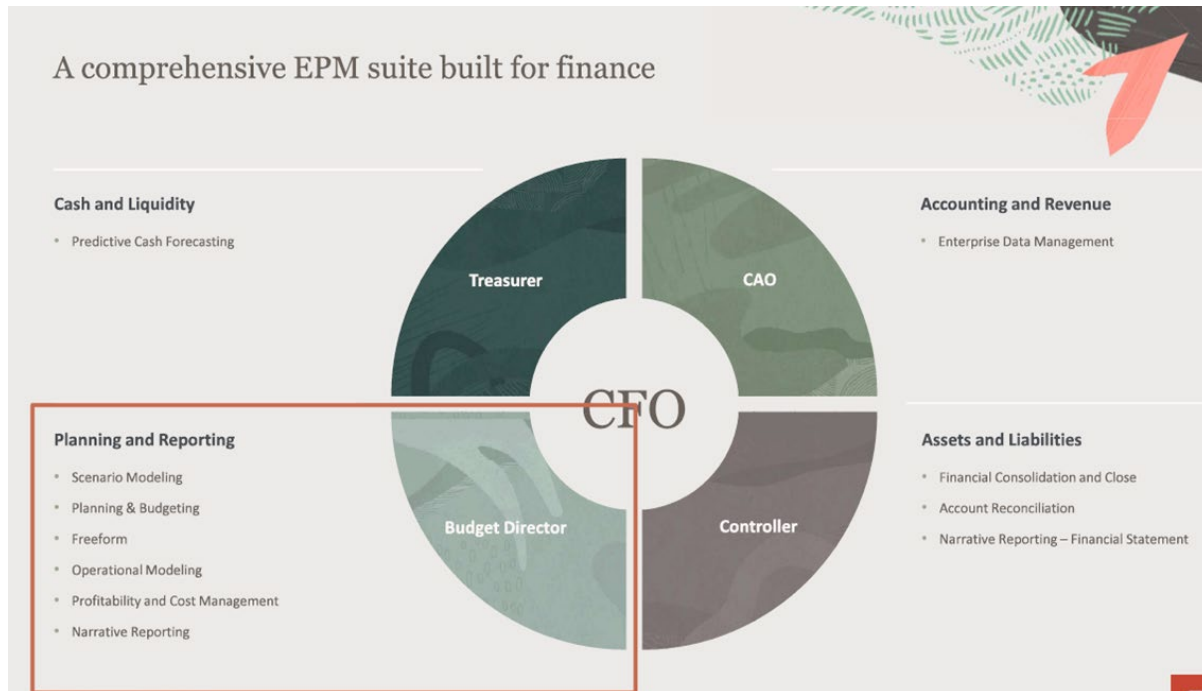


### **Streamlined, Automated Budget Processes**

By automating key planning tasks and reducing reliance on manual data manipulation, the system shortens budgeting cycles, reduces errors, and supports consistent planning methodologies across divisions and departments

# What Oracle EPM Is

- Oracle EPM replaces fragmented spreadsheet processes with a unified platform where all budget managers work from the same data source
- The system supports annual budget development, mid-year revisions, and ongoing monitoring with built-in reporting and variance analysis tools
- Enhanced transparency across departments and divisions means Finance, leadership, and budget managers can all access consistent, up-to-date information



## Centralized Budgeting

Single system for departmental budget development and revisions

## Enhanced Reporting

Improved variance analysis and financial transparency

## Cross-Department Visibility

Better collaboration and consistency across divisions

## Timely Decisions

Real-time data access for faster, more reliable planning

## Structured Workflow

Standardized processes with clear approval paths



# What Oracle EPM Is Not

Oracle EPM is a **tool that enables better budgeting**—you remain the **decision maker** with full control over your department's financial planning



## What EPM Does **NOT** Do:

- Does not replace departmental authority or override budget manager decisions
- Does not automatically change budgets without your review and approval
- Does not manage timekeeping, effort reporting, or HR functions
- Does not eliminate the need for thoughtful review, collaboration, and final approval by budget managers

**FY2025-2026**

## Incremental Adjustments



Over the past year, we have experienced increased financial pressure driven by several converging factors, including salary growth exceeding budgeted levels, rising operating costs, and long-term commitments related to facilities, systems, and compliance obligations. While Jacksonville State University remains financially stable, these trends—if left unaddressed—would create structural challenges that could limit future flexibility and investment.



**FY2026-2027**

## Redesigned Budget Model

# Budget Realignment Message

## What We Ask of You:

- Be open to learning a new system and trying new workflows even when they feel unfamiliar at first
  - Provide honest feedback as we go so we can adjust training, documentation, and support to meet your needs
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### 1. Personnel and Staffing Controls

- Continued review of all vacant positions, temporary labor, stipends, and extra compensation
- Strategic hiring pauses or re-prioritization where salary costs exceed budgeted levels
- Enhanced coordination between Finance, HR, and division leadership on staffing decisions – *international faculty hires*

### 2. Discretionary Spending Reductions

- Targeted reductions in travel, professional development, contractual services, and other discretionary lines (Allowable Program and Course Expense Information)
- Strict enforcement of prior guidance (e.g., travel reductions) with centralized monitoring and reallocation as needed
- Expectation that divisions exhaust internal options for savings

## What We Commit to You:

- Hands-on support from Finance staff who are accessible, responsive, and committed to your success
- A realistic, measured rollout that respects your workload and avoids unnecessary pressure or rushed deadlines

### 3. Program and Unit-Level Financial/Academic Reviews

- Review of academic programs and operations (ex. summer course offerings)
- Development of corrective action plans, process efficiency, service restructuring, or service changes
- Ongoing monitoring to ensure corrective actions are implemented and sustained

### 4. Enhanced Financial Monitoring and Compliance

- Increased emphasis on multi-year budget modeling and cash flow monitoring
- Continued collaboration with Internal Audit and compliance partners to ensure alignment with grant, regulatory, and contractual requirements
- Careful management to protect liquidity

## What will we be working on?

### May – June 2026

*More incremental department-identified budget reductions will be implemented for the remainder of the 2025-2026 fiscal year.*

### June – July 2026

*Oracle EPM User Training & Budget Model Redesign*

### July – August 2026

*Departments revise their 2026-2027 Line-Item Budget in Oracle EPM*

### August – September 2026

*2026-2027 Adopted Budget Review & Analysis*

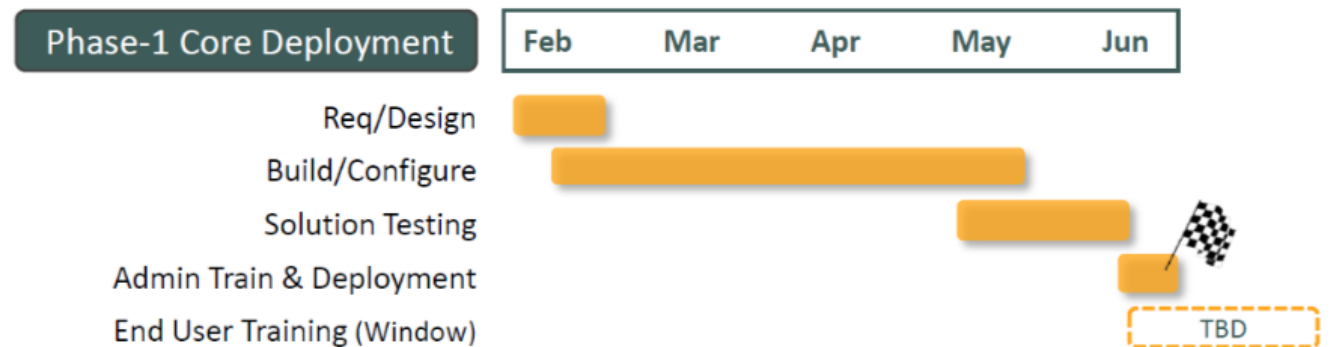
# Implementation Timeline

### Phased Rollout

Core functionality first, expanded features later

### Built-In Testing

Validation at every stage



- We are starting with **core budgeting functionality**—the essential tools you need for **annual budget development** and approvals
- Future phases will add enhanced reporting, scenario modeling, and advanced analytics once the foundation is stable
- Testing and validation are built into every stage of the process to catch issues early and ensure smooth transitions



***JAX STATE***

Planning & Reporting Software

**Implementation  
Approach**

# Roles & Responsibilities

## **BUDGET MANAGERS**

- Accountable for all budget decisions and final approvals
- Review and validate EPM submissions before workflow advance
- Collaborate with assistants and Finance for accuracy

## **BUDGET ASSISTANTS**

- Enter and maintain detailed budget data in Oracle EPM
- Run reports, support reconciliation, handle routine tasks
- Communicate regularly with managers about data changes

## **FINANCE OFFICE**

- Configure system rules, workflows, and security settings
- Provide training, guidance, and job aids for all users
- Serve as primary resource for technical support

**Small changes today become millions over a decade**

# Training & Support

## Role-Based Training

▣ Testing/Training	25d	05/15/26	06/18/26
▣ Training/Testing Documents	9d	05/15/26	05/27/26
Admin/User Training Guide	5d	05/15/26	05/21/26
User Stories	4d	05/15/26	05/20/26
Test Scripts	5d	05/21/26	05/27/26
Admin Team initial Testing	5d	05/28/26	06/03/26
Admin Team initial - Fixes/Retest	4d	06/04/26	06/09/26
User Training	7d	06/10/26	06/18/26
Testing/Training Complete	0	06/18/26	06/18/26
▣ Deploy	2d	06/19/26	06/22/26
Migrate to Production & Validate	2d	06/19/26	06/22/26
Live System	0	06/22/26	06/22/26

- Training will be tailored by role—budget managers receive decision-focused sessions while assistants get hands-on data entry and reporting training
- You'll receive step-by-step job aids, reference documentation, and access to both live and recorded training sessions
- Finance will provide ongoing support during the first full budget cycle to help you troubleshoot issues and build confidence
- Remember: No one is expected to master Oracle EPM immediately—we're building expertise together over time

## What should you expect?

**Budget system user testing scripts will be provided to verify financial accuracy, calculation logic (budget vs. actual, over-budget alerts). Key scripts include validating transaction entries, checking automated budget calculations, and verifying monthly resets.**

**You will learn the new system functionality and data reports to aid in budget management**



## What Happens Next

- The Controller's Office will follow up with individual departments to confirm user roles and ensure everyone has access
- You will receive a detailed training schedule tailored to your role, with different sessions for managers and assistants
- Before formal training begins, we will provide an initial system walk-through in a no-pressure environment

### **Kickoff Follow-Ups**

Post-meeting Q&A and individual outreach



### **User Access & Role Confirmation**

Verify your role and receive system credentials



### **Training Schedule Distribution**

Receive dates for your role-specific training sessions



### **Initial System Exposure**

Guided walk-through and sandbox environment