



Beyond the cloud:

Preparing for student and
academic services in the cloud

You know it's time to start planning your move to the Cloud, but do you know what you want your institution's future to look like? Dedication of time upfront to intentional and aspirational institutional planning can be the difference between a system implementation that perpetuates outdated modes of working in a new and costly platform, or a system implementation that supports long term strategic goals that will help your institution to thrive for years to come. In short, it is the difference between transition and transformation.

Student Information Systems (SIS) bring academic, enrollment, and student services departments together with powerful tools that can create time and money saving efficiencies and improve student success outcomes through enhanced and student-focused crossfunctional processes, but even the best-in-class solution will only be as good as the planning that goes into the implementation. By creating a roadmap for a transformed future state, institutions will not only have an easier implementation experience, they can help ensure the Cloud migration is designed with broad organizational goals in mind. In this way, the Cloud implementation will become part of the institution's future outcomes instead of the Cloud implementation driving the institution's future.

Because SIS are designed to integrate the functions of departments from all corners of the campus or system, the implementation of these systems can be a sprawling, and at times overwhelming experience.

Focusing on transformation builds excitement and opens the door for partners across the campus community to participate and buy into the vision for a future state. This stakeholder investment will be critical as Academic and Student Services units will be asked to reexamine and reimagine service delivery models, review policies and compliance impacts, understand privacy and security landscapes, analyze current technologies, and develop reporting and analytic strategies to define and structure the data that will help drive the new SIS.

This sounds like a daunting task, but by breaking it into clearly defined steps through development of the roadmap in advance, the process becomes manageable and achievable, which can save you time, money, and energy during the technical implementation. Building a roadmap can create a path to success by anticipating and addressing many of the difficult questions that an SIS Cloud implementation will uncover, and helps the institution stay closely aligned to the strategic goals throughout the implementation process.

Plan for the Cloud now so you are prepared across the institution saving time and energy.

Where to focus

A cloud migration is a major investment. In this era of limited resources and an increased focus on Key Performance Indicators (KPIs), it is important to get the most out of the technology that is being implemented. The SIS is a technical foundation for processes, record keeping and compliance; however, it is how the institution and staff maximize what is available from the software that can transform processes, fully leveraging the technology to increase efficiency and efficacy of administrative functions, and most importantly, to improve the student and faculty experience.

So how can this be accomplished, and what does a roadmap look like? We ask that organizations consider beginning with four key areas of focus.

Four key areas of focus

- 1 Operational and process transformation for a positive student experience**
- 2 Student and staff focused organizational effectiveness plan and implementation**
- 3 Technology landscape review and strategic direction planning for institutional reporting**
- 4 Review and catalog institutional, state, and federal compliance**

1 Operational and process transformation for a positive student experience

The first step in building a roadmap for a Cloud transformation is examining current processes through a lens of student impact. How can your institution align operations and practices for cost efficiencies while also improving the student experience?

It is important to conduct this exercise with all campus offices and departments that will be impacted by the Cloud migration project. Depending on the scope of the SIS you are considering, this will likely include Enrollment (Recruiting and Admissions), Registrar, Financial Aid, Bursar/ Student Accounts, Student Affairs, and Academic Affairs, along with any other office that plays a role in the student lifecycle. As you begin to map and assess processes across campus, it is better to err on the side of inclusion to ensure all unique operations and system needs are fully documented. Have you included the office handling student employment and for credit internships? What about study abroad programs? Even your fundraising office may have a role to play. Some of these offices may rely on auxiliary systems, such as a standalone CRM to support new student recruitment or student success; integrations with these systems will need to be accounted for in the transformation.

Because this transformation will likely impact so many stakeholders across campus, it will be important to develop and document a formal governance structure for the project. This will be particularly important for decision making and for building consensus. Who is leading the project? Who has responsibility for day-to-day decision making versus decisions that impact the overall project direction?

There will not be a one-size-fits-all solution, so it is important to ask these questions now and not mid-stream of the implementation. It is equally important to document what you find, just as you would take note of turn-by-turn directions on a long road trip. While it is important to discuss and document all current processes, it is even more important that these conversations serve as a foundation for imagining the future state. The most successful SIS transformations are rooted in this guiding question: How is this serving students, and how can we do this better?

How is this serving students, and how can we do this better?

We have worked with clients who used strategic, collaborative planning as a way of leveraging their SIS implementations to improve cross-functional processes. Here are some examples:

Institutional scholarships

Pre-transformation

With separate and duplicative record keeping systems across the campus, there is no definitive source of truth for institutional scholarship and grant funding. This can result in students being over- or under-awarded institutional funds and mismanaged budgets.

Post-transformation

All sources of student funding are tracked in a single system with a single source of truth. Departments have access to real time budget and student eligibility data to make informed decisions on how to best leverage precious student aid dollars.

Class cancellation for non-payment

Pre-transformation

With disjointed communication across offices, students saw their classes cancelled while they were still trying to resolve payment issues, waitlists were managed haphazardly, and students lost access to federal aid and scholarships due to low enrollment.

Post-transformation

A unified SIS supports coordinated processes across the Bursar, Financial Aid, Registrar, and academic schedulers. Students can plan on predictable waitlist cycles and clearly defined policies regarding payment timelines and registration holds.

Document imaging

Pre-transformation

After heavy investment in document imaging systems, some institutions failed to coordinate across departments, resulting in information siloes. Many processes still relied on paper documents moving between offices, document indexing was inconsistent resulting in “lost” documents, and the new systems cost staff more time and caused delays for students.

Post-transformation

Students self-submit documents online, which triggers automatic completion of checklist items. Documents are routed for necessary review and approvals to predesignated individuals or groups through workflows, creating a seamless student-centered experience.

2 Student and staff focused organizational effectiveness plan and implementation

You have established your baseline of current state, and you have made a wish list for future state. The next step is to develop a step-by-step plan to get from point A to point B. By creating an organizational effectiveness plan, you begin to lay the framework of your implementation.

By now you should have a matrix of departments and processes from your work in Step 1. Now it is time to return to each department to identify and address the most complex or dysfunctional processes. Where are the pain points? Work to understand where leadership would like to see improvements and engage the staff to understand how this transformation can make their jobs more satisfying. This is an opportunity to build excitement about the coming change with the staff who will be most impacted.

As a review of pain points begin, an overarching approach and plan will emerge for leadership to take action. For example, we have found that a good place to start is working with staff to document the issues most related to delays in disbursement of financial aid, roadblocks to students registering for required classes, and all the student calls during the first week of the term. Campus staff are on the front lines working to get students enrolled and moving toward degree completion, and they will get excited about improving those processes—both for the success of students, and for their own job satisfaction.

Walk through each process with the staff looking for opportunities to streamline and to improve the student experience. Identify redundancies and steps that impact or are dependent on other units and bring together staff and leaders from across campus to facilitate collaborative conversations about these dependencies.

The goal of these conversations is to document not just an ideal future state, but an ideal future process. These processes will evolve as the institution moves through the SIS Cloud implementation, but this roadmap will inform the final configuration of your system and help ensure your out-of-the-box technology supports the organizational decisions that complement the strategy and vision. Evaluation of these processes will continue during sustainment phase and beyond as job responsibility refinement and enhancement occurs.

Schools, departments and/or division leaders will have a unique role to play throughout these planning conversations. While team leaders and frontline staff can and should take ownership of designing processes, mid- to senior-level leaders will need to pay special attention how the new processes will impact job expectations and organizational structures that undergird the work. Leaders need to work proactively with their human resources officers to review and update

Common interdepartmental “problem processes”



Scholarship awarding

To identify and award students eligible for donor-funded or institutional grants and scholarships, data must be both protected and shared across the financial aid, registrar, and advancement offices.



Change of major

How does a student declare a new major? Does it need to be approved by the new department and/or the old department? Do academic advising or financial aid need to be notified?



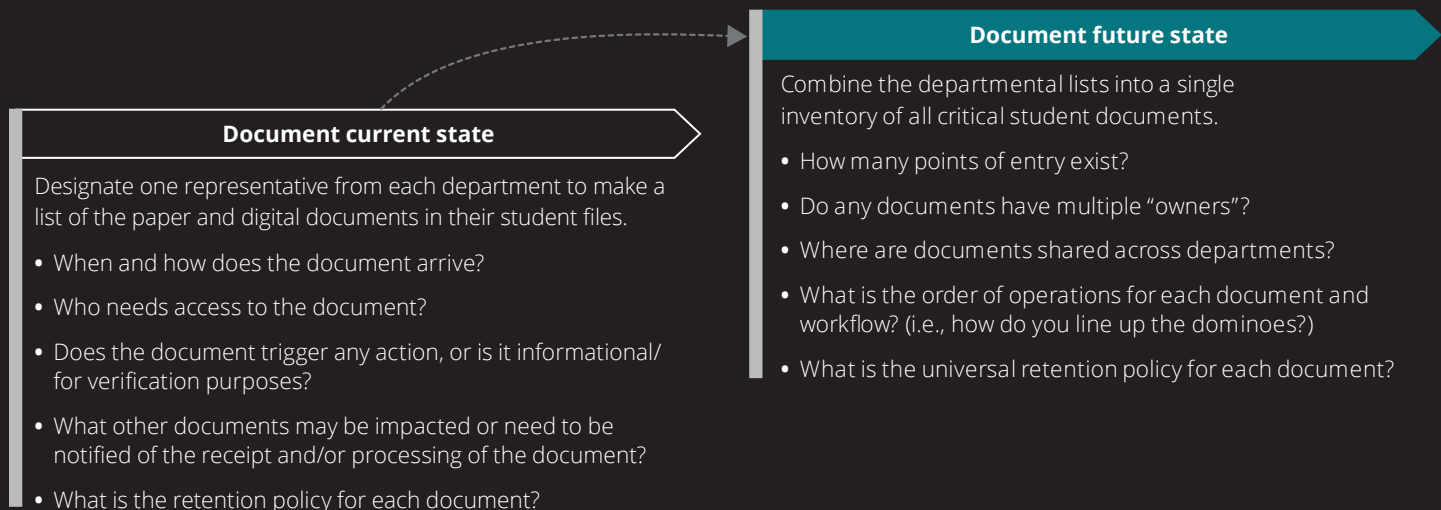
Classroom assignments

Not all classrooms are created alike. Some may not meet accessibility standards while others are too large to host small seminars. Specific classes have specific lab or technology needs, while others may not meet faculty preference. Registrar staff need to coordinate with academic schedulers to ensure efficient space utilization while accounting for the specific needs of each course.

position descriptions, and to identify training or upskilling needs among the staff. In our work with campuses across the country, we have seen that jobs often become more student-service focused and less transactional. In other cases, staff will need to learn new technical skills to stay current with constantly evolving proprietary software platforms. Formal change management efforts are non-negotiable with a transformation of this scale.

Roadmap to integrated document imaging

What a conversation about dependencies might look like, and how to organize the discussion



3

Technology landscape review and strategic direction planning for institutional reporting

You've fully documented your current state, identified dependencies across campus, and worked with an inclusive group of campus representatives to redesign the path that a student (or student record) follows from recruitment to graduation. With the right planning, the move to the cloud can also support enhanced reporting, and the development of comprehensive analytics with impact on institutional goals such as student graduation rates or strategic enrollment planning.

In order to develop or augment effective institutional reporting and to ensure seamless functionality of systems across the technology landscape, the next step on this journey is to align your campuswide process map to your current technical landscape, including the development of a strategic plan for institutional data. This is also the time to confirm whether your selected SIS supports all your institutional needs, or if you need to consider additional technology products or partners to support specific processes and functions.

Evaluate current technology landscape for gaps

Work with your partners across campus to develop a comprehensive list of software platforms currently in use on campus. With each software product, indicate how many instances exist, where they exist, and what processes are managed in each instance.

Next, review documentation of your future SIS to make a comparable list of processes that will be handled by the modules being implemented, then correlate these two lists to the list of processes outlined in the map you created in the previous step. Take note of both overlaps and gaps.

Gaps represent an opportunity deepen the campus discussion of potential policy and/or process revisions. You may find that some of the processes that were initially considered sacred cows are now on the table for review as a result of the ongoing conversations about transformation. Now is the time to move to streamline any remaining speedbumps in the student lifecycle. Most comprehensive SIS platforms are designed to handle the majority of common processes in colleges and universities. Any gaps not solved through more efficient processes will need to be addressed through potential policy and/or process changes as mentioned earlier. If those gaps are still not solvable at the conclusion of the transformation conversations, additional software or custom-built solutions may need to be considered. At the other end of the spectrum, any redundancies may signify opportunities to retire duplicative systems and reallocate budget to more critical technological infrastructure—or to support purchase of the auxiliary software platforms that may have emerged as necessary additions to the transformation effort.

Develop data, analytics, and reporting strategy

Taking this same technology inventory as a starting point, identify the entry point and the locations of each “single source of truth” for all critical data points. For example, international students may have academic data stored in the SIS and visa information stored in a third-party system such as a customer relationship management (CRM). To develop a complete report on international student enrollment, both systems will likely need to be accessed.

Similarly, review your process map with your stakeholders and your campus partners to identify critical reporting needs and wish lists. This should include all required (federal, state, and institutional) reports, operational reports, and analytical reports. Is there a daily report of students not registered for the next term that needs to be recreated in the new SIS? What data does the Provost's Office need to guide budget decisions related to hiring part-time faculty? Review the list with all stakeholders to ensure they will still be relevant in a new system, keeping in mind that some reports will be made obsolete by the new technology being implemented.

While some partners will be obvious when considering student lifecycle data, there will also be other less obvious stakeholders in reporting requirements, such as Finance or Human Resources. Many faculty and staff take classes, graduate students and student workers are employees, and financial aid disbursements are monitored by finance and accounting areas. Do not neglect to consult all potential partners as you build the strategic foundation of data and reports.

Security and access training

Many of our clients report that their move to the cloud revealed an unexpected number of security gaps in their old processes and technologies, as cloud-based technology often allows for more intensive security measures and fine-grain security roles. While there are obvious benefits to moving toward a more secure technical landscape, staff will need support and training to understand the purpose of security roles and how they are determined. Some of this education must take place in advance of working with stakeholders to develop roles, but sitting with staff to document a typical user's "day-in-the-life" processes is a natural opportunity to continue that conversation.

Organizational transformation strategies

Equally important as your data and technology strategies are your organizational transformation strategies. The development of a data and reporting strategy can have a significant impact on the jobs of staff whose decision-making processes must adapt to a new way of thinking. Whereas anecdotal evidence or institutional tradition may have been a sufficient method of assessing decisions in the past, the organization will now have tools and data to provide insight and nuance that may challenge some of those old ways of doing things.

You will need to account for this as you develop your plan. The roadmap must include adequate time and support to prepare staff for the new skillsets they will need, as well as strategic change management efforts to ensure impacted staff and their supervisors remain committed to the overall goals of the transformation, even as it leads to inevitable moments of discomfort. Moving to a new way of thinking and working can be challenging. Wherever possible, have patience and schedule ample runway for staff to adapt. It will be well worth the reward of long-term job satisfaction and measurable improvements to student success indicators, budget savings, and the overall health of the organization.

4

Review and catalog institutional, state, and federal compliance

Now you are in the final leg of creating your roadmap, having completed a comprehensive inventory and assessment of work occurring in all corners of your campus (or campuses). You have mapped your department-specific and institution-wide processes, created a plan for strategic improvements aligned with your institution's strategic goals, overlayed those plans against the realities of a software implementation, and laid the groundwork of successful change with your stakeholders throughout the community. In the final step, you will turn your attention outward by reviewing and cataloging compliance impacts as they relate to federal, state, and institutional policies.

Return again to your matrix of processes to identify procedures that have compliance and policy impacts. Many of these will have already been identified in your list of external reporting needs, though not all externally regulated processes have reporting elements, and not all compliance related processes or policies will be immediately apparent. Some policies that require review may be embedded within other policies. For example, as your new SIS comes online, an option to include student photos on class rosters may present itself. Is there a correlated institutional policy regarding retention and storage of student photos beyond the general FERPA disclosure? If not, now may be the time to develop one.

Work with your campus partners to help ensure that each process will maintain or improve efficiency and compliance under your newly designed procedures. In some cases, you may need to submit academic policy changes to your various governing committees. In other cases, you may simply need to monitor and review process impacts post-implementation. In all cases, ensure that each process has a clearly defined chain of command and clearly stated expectations for the staff who are monitoring the changes.

From planning to implementation

Once institutions begin the transition to the Cloud, creating the project outcomes that align with the overall institutional plan and roadmap will be easier if your planning has been effective and you have established support from administrative leaders. Yes, there will be challenges moving to the Cloud—this is a big transition, and it will not always be a smooth path—but the more an institution has prepared in advance the smoother the implementation will be. Governance will have the background needed to support effective and informed decision making for the Cloud implementation.

Whether you are transitioning from a homegrown system or replacing the current on-premises software, moving to the cloud is a large-scale implementation with significant time investment required; this is not a simple upgrade. Work now to secure commitments from across your organization to commit the time and resources needed to complete adequate planning work so the implementation is approached strategically and comprehensively. It will save time and money in the long run.

By planning now, difficult decisions are addressed up front and will help reduce review time during the technical implementation. It will allow the institution and project team to focus on the mission and vision created during the development of the roadmap, which will keep the project moving smoothly and on pace.

Deloitte uses time tested methodologies from Planning (Enterprise Services Transformation/ EST), Design (Elevate) and Implementation (Momentum) to create a seamless move to the Cloud through the benefits of utilizing the roadmap objectives and outcomes created in the EST planning. Benefits include time-saving decision making, positive staff energy, and process efficiencies during the project implementation.

Common policy pitfalls



Dual degree programs

Dual degrees are a common practice at many institutions, and also a common pitfall. Students often confuse dual degrees with double majors, and do not always understand the specific policies related to dual degrees. Billing and financial aid can also be a source of ongoing confusion.

- Review your dual degree policy. Is it clearly worded?
- Review how dual degrees are coded in your new SIS. Typically, one program will need to be set as the primary. This configuration can have various cross-departmental impacts, so review if the setup performs as desired across departments to support the students.
- Review the scholarship policies and review any coding that checks for student eligibility to ensure dual students retain access to all institutional aid that applies to them.
- Document any gaps with tuition attribution and billing, which can be a frequent source of compliance findings.



Term start and future dated information

Staff within institutions that operate on a traditional academic calendar often need to plan for and react to dates in the future. Policy changes are typically associated with a catalog year rather than taking immediate effect. Most Cloud SIS platforms are equipped to anticipate and adapt to future dates, but this does not preclude adequate training and preparation by the staff.

- Review curriculum change, scholarship deadlines, and tuition due dates to anticipate when the new policies will be published.
- Review current policies for any missing approvals or deadlines.
- Educate staff on the timeline for change, and the process by which curriculum changes are approved.
- Clearly document and train staff on how and when to use future dates in the SIS.

Transformation is necessary for a successful SIS Cloud implementation. This means being open-minded to shifting processes and service-delivery responsibilities, and most importantly, keeping the student experience front and center. By staying focused on the mission, vision, and values created during EST planning, and using the roadmap to establish and maintain leadership alignment, governance committees, and community involvement, your Cloud implementation can advance shared institutional goals, enhancing student success through improved efficiency, accuracy, and compliance.

Deloitte's proprietary approach to SIS Cloud implementation incorporates a first step we call Elevate. If Enterprise Services Transformation (EST) is completed prior to the implementation, the project kickoff will validate the EST roadmap, then the Elevate step will focus on the technology details of the SIS Cloud implementation. This includes data flows, configuration attributes, data conversion planning, operating procedures and tools, the system architecture, and other details needed during initial SIS implementation planning. If EST is not able to be performed prior to the Elevate process, it is incorporated throughout the project complementing our Momentum methodology.

The Elevate phase in the first step in Deloitte's Momentum methodology for SIS Cloud implementation. This sequential methodology is a proven approach that has supported successful implementations across the country, forging lasting partnerships with institutions and higher education systems. We adapt this methodology in response to the unique characteristics and student populations of each institution or higher education system to fully support an ideal future state and defined goals and outcomes, setting up each organization for continued transformational opportunities after the SIS Cloud implementation.

As the SIS Cloud project moves through the methodology phases, leveraging the roadmap will allow for quicker decision making, consensus building, and user adoption. Communicating the roadmap components throughout the SIS Cloud implementation, in particular the future state goals and guiding principles, helps to build and maintain morale among impacted stakeholders and provides a clear focus for the project team members and the community. The roadmap helps to keep the governance committees engaged and supportive of project goals and outcomes through ongoing clarity of the future state the institution is working toward. And in practical terms, the roadmap also keeps scope in check and cost overruns to a minimum because outcomes and parameters are clearly defined at the outset of the project.

However, perhaps the most impactful advantage of the advance roadmap planning is that after the project stabilization and sustainment phases, organizations are prepared to immediately continue the process of continuous transformation and enhancement of student services and strategic goals. The true value of the roadmap is not just that it provides a guide to the SIS implementation, but that it provides a roadmap for the future—one that can constantly evolve along with evolving technology and student needs. The foundation, the cloud-based Student Information System, is in place and provides the foundation your academic, enrollment, and student services units need to keep your institution thriving for years to come.

Case study: University of Rochester Workday Student Implementation

The University of Rochester collaborated with Deloitte in the design and implementation of their transition from a homegrown student information system to the Cloud. A frontrunner in this type of transformation, they were one of the first Workday Student schools to go live with the new system.

In preparation for their transition to the Cloud, the implementation team at the University of Rochester engaged the community in conversation about the design of the system, building buy-in for the concept of the evolution to the cloud and the possibilities of an ongoing evolution. As a result of these conversations, the team was able to articulate clear goals and guiding principles.

Project goals

The University of Rochester envisions a reliable, high quality student information system and processes that will achieve the following strategic goals:



Be **flexible and extendable**, accommodating current priorities and requirements, and have the ability to easily evolve with changing and as yet unforeseen academic and administrative realities such as new forms of assessment and outcome tracking.



Provide **robust data capture and reporting capabilities, and verified, complete data** to allow the University and our schools to better understand and support progress toward strategic goals, and the progress of our students toward their academic goals.



Provide a single **integrated** source for core student data and services, and easier, real-time, integration with ancillary and third-party systems.



Create a **personalized** system that provides users with the information and services they need, when and where they need it.



Result in **configurable, reliable, and automated processes** for students, faculty, and staff to achieve better outcomes with less effort.

Guiding principles

As an early adopter of the cloud-based Workday Student, the University of Rochester understood that the product they would initially go live with would be more limited in scope and functionality than later releases. The implementation team used this constraint to their advantage by taking a phased approach that allowed the community to adapt incrementally to the new technology. The phased approach allowed units to stabilize their processes before introducing further changes, and it also opened space within the implementation process to assess and adapt throughout the change experience, and to reflect on a number of lessons learned.



We will **adopt common business practices** wherever possible to support a consistent experience. We will differ only where absolutely required.



We will structure data to improve our collective **reporting and analytic capabilities**.



We will **automate activity and processes** to enable staff to improve service for all stakeholders.



We **value integrated systems** and processes over disparate systems and processes. We will **adapt** business and academic practices **as necessary** to implement an effective solution.

About this institution

University of Rochester

A private R1 university located in Rochester, New York, the University of Rochester is ranked among the top research universities in the country in science, engineering, medicine, humanities, and the social sciences. The University enrolls over 12,000 undergraduate, graduate, and professional students and employs over 27,000 faculty and staff.

Lessons learned—top ten insights

1 Shared values

Create, utilize, and refer to values and guiding principles from the beginning of the planning stage, then continue to return to these principles throughout the program implementation. These values guide decisions, keep stakeholders focused, and put the student experience at the forefront of the change. This approach worked well for the University of Rochester, and the guiding principles are still used today as the system continues to undergo further refinements.



2 Implementation

Communicate the reason for the change (such as a “dying ecosystem”) and share the goals of the project in all stakeholder discussions throughout the implementation. Also identify where there are knowledge gaps among stakeholders to ensure everyone involved has the same baseline understanding. For example, the University of Rochester implementation team realized early on that the campus needed to understand the agile methodology in order to understand how the iterative process worked, and how it would impact their experience of the implementation.



3 Transformation

Clearly articulate transformation as the primary goal of the project and how this will translate into reality. At the University of Rochester, some stakeholders assumed that transformation would happen automatically as a result of implementing the new system. It was important to communicate the expectation that the most impactful elements of the transformation would take place once there was an understanding of how the new application and processes complemented each other.



4 Student and faculty experience

Focus on the positive impact on the student and faculty experience. Reviewing academic policies and procedures, seeking input from faculty on pain points, and soliciting or conducting usability on processes to gather student input. At the University of Rochester, stakeholders were engaged across the campus, but faculty and students were not as deeply involved as they could have been. This has been a course correction that has informed the ongoing improvements to the system.



5 Clearly communicate realistic expectations

Especially for early adopters of new technology, it is critical to communicate realistic expectations for the implementation process. Identifying software gaps is part of the process, as is determining how to mitigate those gaps. This process will be easier and more effective with an intentional change management and communication plan, to support end users through the new experience. The University of Rochester team mandated training for all users as part of the implementation experience.



6 Core processes

It is critical to communicate to stakeholders that with a new system, the first step is to ensure all core functions are working as expected. With the baseline student information system implementation as the foundation, process adjustments and continuous improvement will enhance the user experience over time.



7 Understand downstream change impacts

Investing in systems, processes, and people for a comprehensive understanding across all functions of the university is essential because the SIS is at the center of a whole host of campus-wide processes. For example, the University of Rochester discovered that despite a well-planned effort to include all relevant parties and processes in their planning, they had neglected to fully assess and document the structure of their legacy data in the context of Institutional Research (IR). While not insurmountable, this oversight hindered the IR team's ability to pull common reports from the data warehouse immediately following go-live. Cloud transitions can have similar impact on processes, particularly when those processes cross systems or departments, such as the process to change a student's academic status.



8 Create a robust sustainment program

Include ongoing change management in the stabilization program, even with a right-sized IT support team. The ongoing releases and improvements of the Cloud SIS will require both technical and functional resources to ensure policies and processes are assessed and supported with the same level of attention applied during the initial implementation. Similar to other ERP providers, Workday is constantly enhancing their Cloud SIS offering in response to the changing needs on campus. It is critical to leverage the resources, processes, and governance structures that were established during the implementation to support ongoing maintenance and improvement.



9 Highlight process improvements and changes

In addition to identifying and responding to gaps in the new system, it is equally important to document and highlight the positive changes. Capitalize on these wins both from a communications perspective and from a system perspective, building buy-in and taking full advantage of the new system's capabilities. Provide updates on the continuous improvements with each release focusing on the student experience and tying improvements back to the original guiding principles.



10 Development of the future workforce

Projects such as an SIS implementation provide opportunities across a campus for staff from multiple departments to develop professionally. By investing in ongoing training and opportunities to work in stretch roles, transformation projects like a Cloud SIS transition provide staff new avenues to grow and advance in their careers, both in information technology and in campus-wide departments. Instead of presenting the implementation work as one more item on the to-do list for already busy staff, framing it as a career development opportunity can improve buy-in and help build excitement around the individual benefits of such a large-scale project.



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