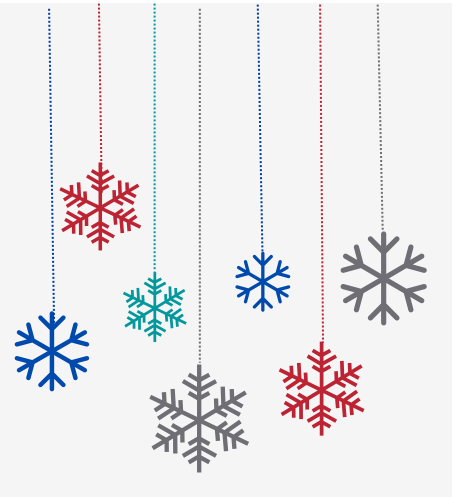# IMPACT23
# INSIDER NEWS

**December 2022** | 5th Edition

## ANNOUNCEMENTS

### System Integration Testing (SIT1): That's a Wrap!

The final day of System Integration Testing (SIT 1), the first of three rounds of SIT testing, was Friday, November 25th. SIT 1 comprised of 43 Leads, SMEs, and SMAs testing scripts to validate financial system functionality, refine test scripts, and remediate defects as identified before additional testers join in January 2023. A total of 713 individual test scenarios were run, with test scripts divided into 12 testing workstreams (e.g., Purchasing, Accounts Payable, Budget, General Ledger, etc.). In parallel with SIT 1, UCR completed the first round of the mock data conversion process. UCR is going through multiple iterations of conversion with UCR data to fine-tune the extracts and test our approach for go-live.

SIT 2 is slated to begin on January 3 and will expand to include additional campus testers identified through the Extended Tester nomination process. We have received a large number of requests to participate in testing - thank you! - and have notified selected testers of the next steps!

## ORACLE GUIDED LEARNING

Oracle Guided learning, also known as OGL, is an information and learning interface layered on top of the Oracle Financials and Budget applications. UCR will implement OGL for go-live to provide communications on new or essential information and provide system users with on-demand guidance tailored to meet UCR-specific processes. Oracle users will have access to the following:

- Step-by-step guides for major processes
- Resources and on-demand help within the application
- Help icons defining values and fields



Oracle Guided Learning (OGL)
Impact23

## What is Changing?

The Impact23 [Program Scope](#) comprises financial system updates and business process redesign to support the implementation of Concur Travel and Expense, Kuali Sponsored Programs, Oracle Financials, and Oracle Budget (EPM). In addition to these updates, the program team has developed a table that outlines UC Riverside applications currently undergoing configuration or rework (rebuild or retrofit) to support the transition to the new Oracle financial system.

**View Financial Applications**

## Change Impact Assessment

A Change Impact Assessment was conducted to provide the program team with a summary of key changes related to the financial system implementation. It provides insights into – what is changing, how it is changing, the level of the change (high or low), and who is impacted. The analysis is focused on new concepts and transformative changes to help guide the program's communication and training efforts.

***How were impacts rated?*** The impact rating is all about the degree of change from the current state to the future state. The team used a rating system of low and high - see change impact examples below.

| Low Impact | High Impact |
|---|---|
| A **low** impact rating represents minor differences between the current way of working and the future state way of working.<br><br>• In [POETAF](#), the "O" in Expenditure Organization (the organization incurring the expense) will align with today's Activity segment | A **high** impact rating represents a significant shift, a fundamental change, between the current state and future state way of working.<br><br>• Budget development and maintenance is transitioning away from spreadsheets and into a cloud-based module |

***What were our findings?***

Legend: Pending | Low | High

Change Impacts

0    50    100    150    200
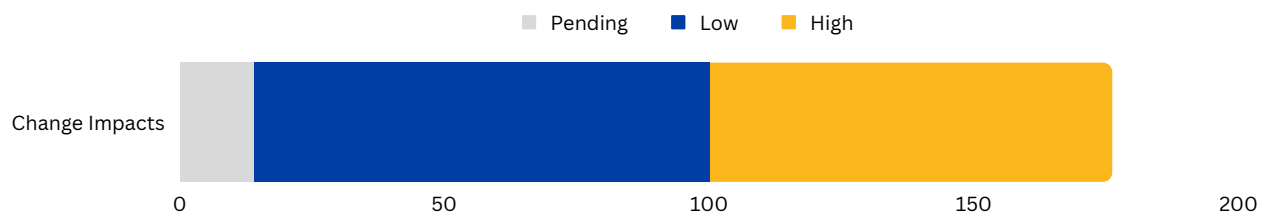
The team documented **176 change impacts**.
- 86 changes have been identified as low impact
- 76 changes have been identified as high impact
- 14 changes are pending a finalized design decision

It is important to note that the team will continue to monitor changes throughout User Acceptance Testing (UAT), as system design modifications may require communication, early learning opportunities, and training.

### How Concur Travel Reservation Fees Work?

UC Riverside has contracted with Anthony Travel, the university's designated travel agency, for self-service reservations (using the Concur Travel module) to assist travelers in making business travel arrangements consistent with UC travel policies and negotiated rates. Anthony Travel charges a $3.00 fee per transaction. The associated fee will be charged if all reservations are made in one transaction. If reservations are made individually, a fee will be charged for each transaction.

Here's what you should know about booking in Concur Travel:

- **Want to save on booking fees?** If the traveler (or delegate) goes to the original record and adds on a car and hotel, the fee is the original $3.00. If a traveler has three separate bookings: one car, one hotel, and one air, the fees will total $9.00.
- Anthony Travel fees are non-refundable, even if the trip itself is canceled
- If a Traveler paid using a personal credit card, and the trip is canceled for an approved reason, an Expense Report may be submitted to reimburse the employee Traveler the associated fee
- For a list of all Anthony Travel fees, see the Impact23 Booking Travel webpage

### How to Search for Requests in Concur

Searching for Requests in Concur Travel and Expense:
1. Login and (if applicable) act as a delegate for the Traveler
2. Navigate and select the Request Header
3. Narrow or expand the search using the Active Requests "Filter"

Keep in mind, the Request ID number will only be in the name of a pre-trip travel request if it is manually added by the requestor before submitting the request for approval.

# ORACLE BUDGET (EPM)

Budgets will no longer be a ledger in the financial system, but a separate module referred to at UCR as Oracle Budget (EPM). For the 2023-2024 Fiscal Year, budgets will automatically be loaded into Oracle Budget. Throughout the year, departments will monitor budget performance and make budget adjustments in Oracle Budget. From then forward, departments will develop their budget plans in the new system during the annual budget development process.



Oracle Budget (EPM)
Impact23

One specific process that will be completed in Oracle Budget during the upcoming fiscal year is creating funding requests. This video shows an example of a user navigating through the system landing page and creating a budget request.

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# TRAINING & SUPPORT

**Miss an event or want to watch it again?**
**You can now access past events on demand!**

**Watch Now**

**Bookmark the Impact23 Calendar**
**Activities that prepare you for new systems**

**View Calendar**

**Impact23 User Group Meeting**
**Thursday, January 19, 10:30 – 12:00 pm** / Link to Join: https://ucr.zoom.us/j/95899916722
Consolidating the former C&G, eBuy, UCRFS and Concur user group meetings. This user group serves as a space for sharing detailed Impact23 decisions and updates regarding the future state financial system.

**Impact23 Town Hall Meeting**
**Tuesday, January 31, 1:00 - 2:30 pm** / Link to Register
As part of our continuous efforts to prepare and educate the campus, we will be hosting another Town Hall session on Tuesday, January 31 at 1:30 - 3:00 pm. We will record the meeting and make it available for viewing for those who cannot attend.

**Concur Travel & Expense Training**
Visit Concur Training and Guides and Videos to learn new travel system functionality and processes. Be sure to attend the Concur User Group meetings for continuing education.

**Contact the team at Impact23@ucr.edu**