

IMPACT23 INSIDER NEWS



February 2023 | 7th Edition

ANNOUNCEMENTS

COUNTDOWN TO GO-LIVE

Change is coming this July

The Impact23 Program will transform how UC Riverside (UCR) transacts, develops budgets, tracks spending/revenue, and performs financial reporting. In less than five months, we will migrate from no longer vendor-supported and homegrown applications to modern, cloud-based technology for the University's finance and research needs. Nearly all financial systems that support finance and grant management and financial reporting will be impacted on July 1, 2023. Here are some concepts to help you prepare:

- All employees, including faculty, will use Oracle, Quali, Concur, boundary systems, or financial reports in some capacity.
- Vocabulary used to refer to different business processes and systems will change.
- Upon go-live, transactions and financial reports will transition from the Full Accounting Unit (FAU) to the new Chart of Accounts (COA).
- The proper coding of transactions is critical for efficiency (eliminates cost transfers) and accurate reporting (good data in, good data out!)
- Pre-approval workflows are required in new systems before transactions are complete.
- Departments are encouraged to increase utilization of the corporate-liability Travel and Entertainment (T&E Card) and the Procurement Card (PCard) for unrestricted goods and services under \$10K now. Procurement Cards (PCards) will remain active throughout the cutover and help limit the impact of cutover processes on procurement operations.

Have you engaged your faculty in the change? Communication is vital when it comes to change, and the program team needs your support! We know that faculty are busy carrying out the institution's teaching and research missions. To help prepare faculty for go-live, please download and use the Impact23 Program Briefing Deck to share the program's advantages, what is changing for faculty, and how the transition will impact them. A few ways to connect include:

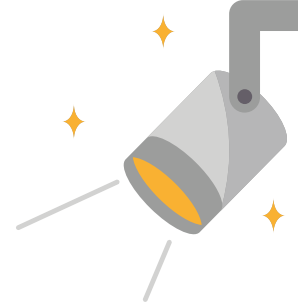
- Share Impact23 information during departmental meetings
- Send content to be included in area or department newsletters/updates
- Communicate through departmental or group listservs you belong to
- Encourage faculty attendance at 3/14 & 3/22 virtual summit sessions



Briefing Deck

WHAT'S IMPACT23 WORKING ON?

Here's what the Impact23 teams is up to right now:



- System Integration Testing 3, the third of three cycles, is currently underway with [Extended Tester](#) participation
- Completing and testing integrations between Oracle Financials and new/current systems
- Testing systems roles to ensure employees have the right roles to do their jobs
- Meeting with Impact23 stakeholder groups and discussing how to prepare for the transition
- Building reports as prioritized by the Financial Reporting Workgroup
- Developing and refining the training curriculum, materials, catalog, reference guides, and FAQs
 - Campus training will start in April 2023. It will continue through launch in July 2023, with ongoing training into the future. We know you need dates for planning purposes. We're working on a more detailed timeline and will release that as soon as it's ready.
 - The training team continues to develop and review training materials, and these include 17 web-based training, 11 instructor-led hands-on workshops with case studies, and the setup of countless [Oracle Guided Learning](#) reference guides and videos
 - Assigning security roles to training courses & materials. The training you'll need depends on the security roles you'll have in new financial systems.
 - Preparing materials for trainers, so they are equipped to teach the rest of the UCR community how to use new or modified systems.
 - Setting up the UC Learning Center training libraries, where you can go to see which training you'll take

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I have been part of a new system implementation before, but did not have the support that we have with Impact23. The Town Halls, and large number of testers is a great way to get as many people aware and kept up to date. It also helps to ensure that all points of view are taken into consideration. It's always hard to leave something familiar for something new, but implementing new technology is going to be a huge benefit to the campus - **Gae Purvis**

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It has been so rewarding to work with the Impact23 [Faculty Advisory Workgroup](#). The faculty are so engaged and genuinely invested in providing feedback and recommendations to support our faculty through this transition." - **Veronica Ruiz**

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Thank you!

110 individuals completed the Winter 2023 Change Readiness Survey!

- We are seeing a modest increase in readiness for the upcoming changes, with awareness and confidence surrounding the new Chart of Accounts remaining stable.
- Individuals have expressed interest in system demos and screenshots, and many of you are eager for the formalized training to begin. We hear you! Please review the [February Impact23 User Group](#) recording for Oracle Financials demos and join us at the Impact23 Summit virtual conference in March!



Congratulations to Rochelle Pinkney from UC Riverside's Student Affairs, Department of Recreation/Student Rec Center for winning the survey raffle! Way to go!

ARE YOU READY TO GO LIVE?

What actions can be taken now to prepare for cutover?

Cutover is the period of time in which certain systems will be unavailable as we transition to new Impact23 systems. To prepare, watch the Impact23 February User Group below and bookmark the cutover webpage to take note of deadline dates, after which you cannot add new transactions to existing legacy systems. Guidance on actions to minimize business disruptions during the cutover period will be provided. As the schedule is finalized, important department cutover and fiscal close activities will be posted at [Cutover & FYE Close](#).



View the [PowerPoint presentation](#) from the Impact23 User Group.

In Case You Missed It...

Watch the February User Group where **Bobbi McCracken** and **Alfred Karam** detail actions departments can take now to prepare for cutover. Highlights include:

- 4:45 – Preparing for Cutover & Fiscal Close
- 27:25 – Payroll Certifications
- 31:15 – UCPath Setup and Cleanup (Position Funding and Cleanup of Fund 69993)
- 47:00 – Oracle System Demos
- 1:20:20 – Office Depot Business Portal Demo



NEW OFFICE DEPOT BUSINESS PORTAL

Use your Procurement Card (PCard) to place orders through the ODP portal

ODP Business Solutions® (Office Depot) and UC Riverside have teamed up to provide great savings on shopping at www.odpbusiness.com. ODP Business Solutions is your supplier of choice for all office supplies purchases, and cardholders can now pay via PCard - no billing, no POs!

Enjoy these great benefits:

- 360+ most frequently purchased items offered at deep discounts
- ODP brands are also available and ready to ship from this [catalog](#)
- No delivery fees or freight charges unless it is a specialized order
- Many orders can be delivered to campus the next business day (8:30-5:00 pm) if placed online by 3:00 pm.

For questions regarding your shipping address(es), placing your first order, a password reset, or other general questions about your account, please contact catherine.collins@odpbusiness.com

DID YOU KNOW...

Reminder: Corporately-billed Travel & Entertainment Card

The Travel & Entertainment Card is corporately-billed, signifying that all transactions are paid by UC Riverside. These charges are expenses incurred but not yet posted/accounted. T&E Card transactions are automatically imported into Concur approximately 48 hours after making a purchase and will appear under *Available Expenses*.

Only travel-related expenses are authorized on T&E Cards, and timely reconciliation of card transactions is required. Please wait until you are able to view the card transactions (Traveler or Arranger) in Concur before claiming the expenses, then move the transactions from *Available Expenses* to an appropriate Expense Report. .



Drag and Drop Receipts

With Concur's newest update, you can now drag and drop receipts directly into an expense. Concur has enabled this feature in several places. You can drag and drop receipts:

- Inside any expense
- To the Available Receipts section
- To the Attach Receipt pop-up

Concur is working on adding more drag-and-drop functionality, so be sure to look for future updates to this feature!

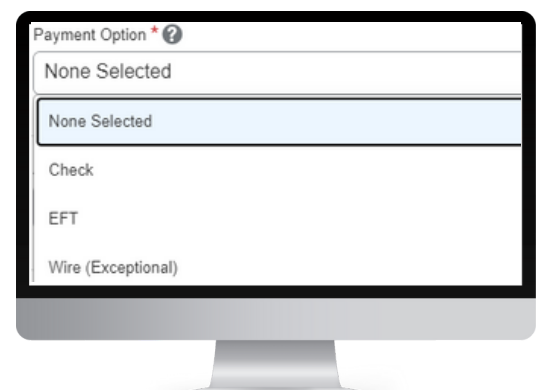
Expense Reports: Travel Policy Reminders

Travelers must adequately account to UC Riverside for expenses on a Travel Expense Report within a reasonable period of time. Please keep in mind that the Concur user is the traveler or the employee who paid for the incurred expense(s). Policy Reminders:

- **Travel Expense Claim:** Travelers must report all travel expenses (T&E Card transactions, out-of-pocket expenses, cash advances, and prepayments) on a Travel Expense Report within 30 days after the trip end date. When a trip lasts more than 90 days, the traveler must submit a quarterly Travel Expense Report.
- **Travel Cash Advance:** If the cash advance is unrecovered or not reconciled within 120 days of the trip end date, the University is obligated under IRS regulations to consider such amounts as income to the employee via the payroll system.
- **Travel & Entertainment Card:** Cardholders should use the T&E Card to pay for their business travel expenses. It must never be used for personal purchases. If any transaction includes a personal/non-reimbursable expense, the cardholder is liable and must reimburse UC Riverside at the time of reconciliation. Work with your departmental staff on repaying the University (your department) for the erroneous charge.

Report Header: Payment Options

Several payment options are displayed to users when completing a Travel Expense Report in Concur. How do you know which to choose? For definitions, refer to the Payment Options guide to ensure the appropriate reimbursement method is selected. The available options are as follows:



Payment Option	Purpose	Considerations
Check	Check is the default payment method for non-employees and guest travelers. It is also the default payment method for employees that are not enrolled for direct deposit payroll payments.	Employee – Check will be mailed to their Department Non-Employee/Guest - The mailing address needs to be correct on the vendor profile as this cannot be updated in Concur
EFT	Default payment method for employees that have enrolled for direct deposit payroll payments (not currently available for all employee classifications)	Employees need to enroll for this option in UCPath. This payment method is not available for non-employees and guests.
Wire (Exceptional)	Payments sent to foreign individuals (not intended for employees)	Exceptional – will route for back office review

TRAINING & SUPPORT

IMPACT23 SUMMIT

MARCH VIRTUAL CONFERENCE

All are invited to the Impact23 Summit virtual conference, which features new system demos, expert chats, interactive brain breaks, and more! In preparation for go-live, this virtual conference will serve as an early learning opportunity and a precursor to formal training (this event is not training). The summit will showcase the new systems' most frequently used transactions, and business process changes for Concur, Kualu, Oracle Financials, Oracle Budget, Boundary Systems, and Financial Reporting. **The summit starts March 7th at 9:00 am!**

[IMPACT23 SUMMIT SCHEDULE](#)



Impact23 Insider News provides important updates related to the new Chart of Accounts (COA), Oracle Financials (ERP, OFC), Oracle Budget (EPM), Concur Travel & Expense (Concur), Kualu (Research, Build, Sponsored Programs), Financial Boundary Systems, and Financial Reporting

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