

# Welcome to the Impact23 Summit!

We will begin shortly...



# Navigating Impact23 as an Academic

March 14, 2023

**Veronica Ruiz**

*Chief Financial and Administrative Officer  
Staff Lead – Impact23 Faculty Advisory Workgroup*

**Bobbi McCracken**

*AVC & Controller and Steering Committee Co-Chair; COA Workgroup Co-Lead*

**Helen Kotke**

*Financial Systems Trainer*





# BEFORE WE GET STARTED

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- This session will be recorded.
- The chat has been disabled, please use the Q&A function to submit questions.
- At the end of the session, time permitting, we will have a Q&A session.
- As a reminder, this preview session is not training. You will be introduced to new terms and concepts and see system sneak peeks!



# SESSION TOPICS

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**Program Scope**

**Key Changes**

**Training**

**Preparation**



# IMPACT23

Program Scope



# Impact23 Program Scope

Nearly all financial systems that support finance and grant management and financial reporting will be impacted on **July 1, 2023**. These are the faculty-facing systems that will be replaced on July 1, 2023:

System/Application	Business Function(s) Supported	Future State Changes & Impacts
Concur	<ul style="list-style-type: none"> <li>Travel Reimbursements</li> <li>Travel and Entertainment Card Program</li> </ul>	Same
ePay*	<ul style="list-style-type: none"> <li>Non-Travel Reimbursements (Phase 2 In Progress)</li> <li>Business Meetings &amp; Entertainment</li> </ul> <p><i>Typically, the only interaction with the system is IF a faculty is an event host and policy requires the host to certify</i></p>	<p>Replaced by Concur</p> <p><i>*ePay will be retained with a more limited scope; mostly focused on non-payroll taxable payments</i></p>
eBuy	<ul style="list-style-type: none"> <li>Purchasing Goods &amp; Services</li> <li>Revised Procurement Card Program</li> </ul>	Oracle Financials – Procurement Concur - Procurement Card Request, Expense Distribution
PAMIS/eCaf	<ul style="list-style-type: none"> <li>Proposals</li> <li>Pre-Award Requests</li> <li>Notice of Award</li> </ul>	<p>Replaced by Kualu</p> <p><b>Note:</b> Additional Kualu Research modules will be implemented for research compliance separate from the Impact23 program, but faculty training will be provided under a single learning path.</p>
PAMIS/PIWRS & Payroll Certification	<ul style="list-style-type: none"> <li>Standard Faculty Portfolio Reporting</li> <li>Confirmation of Salaries Charged to Federal Funds</li> </ul>	New faculty reports available in Oracle Payroll Certification application based on Oracle Project Portfolio Management (PPM)

There are a range of systems that require retrofit to comply UCOP Common Chart of Accounts requirements. You can view a table of impacted systems here: [Program Scope | Impact23 \(ucr.edu\)](#)



# Impact23 Program

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- Administrative staff will be most impacted by the switch to the new chart of accounts and financial systems.
- In late Spring 2023, the University will begin training and preparing faculty and staff for the transition to new systems on July 1, 2023. Faculty-specific training will be provided on when and how to perform actions in new systems.
- During this time, collaboration, patience, and understanding are key to our success as we all move toward modern, cloud-based technology.
- Resources are available to help as we make this important shift toward the future.
- All employees, including faculty, will use Oracle, Quali, and/or Concur (Impact23 systems) in some capacity.
- Faculty and their departments will manage travel, purchasing requests, grants and awards, and approvals in new Impact23 systems.
- Vocabulary used to refer to different business processes and systems will change.

# Faculty Advisory Workgroup

- Provide feedback and recommendations on faculty financial reporting needs as well as other system functionality unique to a faculty members.
- Engage collaboratively and consider the needs and requirements of other faculty in providing feedback and proposing recommendations.
- Identify issues of concern to the faculty, provide recommendations for problem resolution, and the best approach to engaging and communicating with faculty across campus regarding the implementation.

Name	Title	School/Department
Veronica Ruiz	CFAO & Impact23 Faculty Advisory Committee - Staff Lead	Administrative Services and Strategic Executive Team – (ASSET)
Michael Solis	Associate Professor	SOE - Education
Ted Garland	Distinguished Professor	CNAS – Evolution, Ecology, Orgns Bio
Ertem Tuncel	Professor & Dept Chair	BCOE - Electrical & Computer Engineering
Philip Brisk	Professor & Vice Provost for Administrative Resolution	BCOE – Computer Science and Engineering
Peter Atkinson	Professor & Chair of P&B	Academic Senate Rep; Entomology
Scott D. Pegan	Professor	SOM – Biomedical Sciences
Chandra Reynolds	Professor	CHASS - Psychology
Alexander Putman	Assistant Professor of Cooperative Extension	CNAS – Plant Pathology
Qingfang Wang	Professor	SPP – Public Policy
Declan McCole	Professor, Academic Senate Vice Chair	School of Medicine



# KEY CHANGES

Impacting Faculty,  
Researchers & PD/PI



# Key Changes: Chart of Accounts

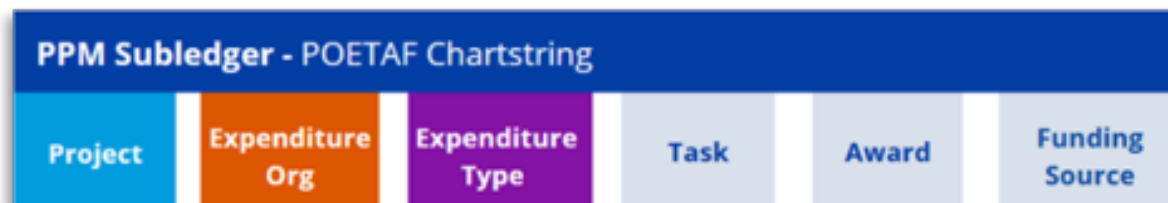
The new Chart of Accounts (COA) will replace the current Full Accounting Unit (FAU)

- A working knowledge of the new COA is necessary to review financial reports.
- All transactions, across all UCR systems, will use the new COA



A modified chartstring, referred to as POETAF, is used when conducting transactions related to Sponsored Contracts & Grants within Oracle Financials.

- Specifically, if goods are being procured using funds from a sponsored award the POETAF chartstring will be used





# Key Changes: Chart of Accounts

## Here is an example of COA and POETAF in action:

This is an email notification, Notice of Allocation, to all concerned parties that an award has been budgeted and/or there has been a change in budget. You'll note that COA chartstring and POETAF chartstring are both listed.

[EXT] ORACLE TEST EMAIL(TEST)-UCR Notification Report for Budget Change for Award



no-reply@email.com

To test-aalon007@ucr.edu; emf@ucr.edu; test-franchak@ucr.edu; test-ivankong@ucr.edu  
Cc aimee.gonzales@ucr.edu; Alison Rodriguez (External); andrew.alonso@ucr.edu; annie.hooper@ucr.edu; april.meinzer@ucr.edu; breanne.juarez@ucr.edu; chantell.mesha@ucr.edu; cherie.pierce@ucr.edu; danielle.garcia@ucr.edu; deanna.vorhees@ucr.edu; Scott.Pegan@medsch.ucr.edu; erica.costantino@ucr.edu; gerardo.rodriguez@ucr.edu; ivan.kong@ucr.edu; jay.melashenko@ucr.edu; Luke Hoepfner (External); maria.sedillo@ucr.edu; monica.cardenas@ucr.edu; montrice.james@ucr.edu; renee.young@ucr.edu; robert.godoy@ucr.edu; robin.testa@ucr.edu; Sally.Tavizon@ucr.edu; susan.hollobaugh@ucr.edu; thomas.wong@ucr.edu; Wendi Tapia (External); alexis.rambaud@ucr.edu; dominica.albitre@ucr.edu; julissa.terriequez2@ucr.edu; laura.schulte@ucr.edu;

Dear Principal Investigator (s) and Department Analyst (s),

This e-mail serves as notification that the below referenced award has been approved and/or had a change of budget. The effective dates for incurring expenditures/commitments are the beginning and end dates specified in the Notice of Award and/or approved capital project funding.

### Award Information

Project Organization (Activity)	Award Organization	Prime PI	Project Number	Project Name	Award Number	Project Previous Budget	Project Current Baseline Budget	Co-PI	Primary Sponsor	Award Start Date	Award End Date	Total Award Direct Funding Amount	Total Award Indirect Funding Amount	Total Award Funding Amount
A01043 Psychology	D01030 Psychology Dept	Franchak, John	K011676001	F0998-11 - FRANCHAK - 05/31/2023 - NEW YORK UNIVERSITY - PLAY & LEARNING ACROSS A YEAR (PLAY) - 87522	K011676	18,527.00	-10,000.00	Franchak, John	NEW YORK UNIVERSITY-8911	06/01/2019	05/31/2023	18,344.87	10,182.13	28,527.00

### GL CoA

[Entity]-[Fund]-[Activity]-[Account]-[Function]-[Program]-[Project]-[Flex1]-[Flex2]  
1511-57000-A01043- XXXXXX-44-000-K011676001-0000000000- XXXXXXXX

- Pick the appropriate expense account for the transactions
- Flex2 segment will always be 0000000000 for Contracts and Grants projects. For capital programs projects pick the appropriate task , CPTask01 for Non-capitalizable costs and CPTask02 for capitalizable costs

### Procurement POETAF

Project Number	Organization	Expenditure Type	Task	Award	Funding Source
K011676001	A01043 Psychology	XXXXXX-XXXXX	X	K011676	NEW YORK UNIVERSITY-8911

- Pick the appropriate expenditure type based on expense account for the transactions
- Task will always be 1 for Contracts and Grants projects. For capital programs projects pick the appropriate task , 1 for Non-capitalizable costs and 2 for capitalizable costs



# Key Changes: Procurement

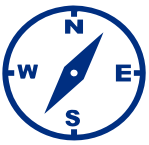
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## **Faculty/PI pre-approvals for purchases and budget adjustments using C&G funds**

- In the future state, the pre-approval workflow is built into system design
- It's important to understand that transactions will not complete until the approvals have been granted
- Please take this into account when considering timelines
- Faculty/PIs will receive status notifications for transparency/awareness purposes

## **Supplier strategy will move to a university-wide strategy to consolidate spending**

- Increase UCR's ability to leverage spend and ability to better negotiate agreements
- A smaller supplier database presents a lower risk to the University
- Not all suppliers will be moved over to new systems. The supplier conversion criteria is:
  - Agreement suppliers (UC-wide and local UCR agreements)
  - Suppliers associated with:
    - DAPOs with balances greater than \$200 within last six months
    - POs with balances greater than \$200 within the last 2 years



# Key Changes: Payroll Certifications

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**Background:** UCR's process for certifying salaries charged to federal funds is the annual Payroll Certifications (PRC). The PRC supports the federal compliance requirement to acknowledge salaries charged are reasonable based on the work performed.

The current Payroll Certification process is organized around UCR's "fund" to report on contract and grant payroll expenditures. With the implementation of Oracle Project Portfolio Management (PPM), the new Payroll Certification process will organize payroll expenditures by Award and the related Projects.

The two structures are not easily merged and there is not a one-to-one relationship between the two structures. Additionally, the underlying structure of the payroll details is changing with the implementation of the new Chart of Accounts. In order to keep the process as simple as possible for everyone involved, the following approach will be implemented as recommended by the PPM workgroup and approved by the Impact23 Steering Committee.



# Key Changes: Payroll Certifications

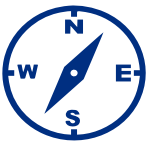
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**Complete all Payroll Certifications through June 2023 under the current “fund” based system.**

- All active federal contracts and grants will be certified based on pay processed through 6/30/2023 under the old Full Accounting Unit (FAU); approximately 972 certifications
- Payroll certification periods will be partial budget years
- Release of the certifications will be staggered between July and August
- PI’s will have 30 days to complete the certification after the release date.

**When the new Payroll Certification system is deployed in September using “award” and “project” data, there will be transition year to align to the normal budget year cycle.**

- All active federal contracts and grants will be certified based on pay processed after 7/1/2023 under the new Chart of Accounts (COA)
- Payroll certification periods will be partial budget years through May 2024
- The normal budget year definitions will resume with the budget year ending June 2024
- July 2023 certification will be issued in early September; all others will be issued according to the standard schedule



# Key Changes: Payroll Certifications

## DRAFT Payroll Certification Transition Schedule

OLD FAU by Fund		
Issued	Count*	PRC Pay Periods Covered
July-week 3	185	normal schedule July 22-June23
July-week 4	126	Aug22-Jun 23
Aug-week1	218	Sept22-Jun23
Aug-week2	136	Oct22-Jun23
Aug-week2	32	Nov22-Jun23
Aug-week3	31	Dec22-Jun23
Aug-week3	56	Jan23-Jun23
Aug-week3	36	Feb23-Jun23
Aug-week4	48	Mar23-Jun23
Aug-week4	42	Apr23-Jun23
Aug-week4	38	May23-Jun23
Aug-week4	24	Jun-23
Total	972	

New COA by Award		
Issued	Count*	PRC Pay Periods Covered
First COA-PRC issued in Sept; one year transition		
Sept -week1	126	Jul-23
Sept -week 3	218	Jul23-Aug23
Oct-week3	136	Jul23-Sep23
Nov-week3	32	Jul23-Oct23
Dec-week3	31	Jul23-Nov23
Jan-week3	56	Jul23-Dec23
Feb-week3	36	Jul23-Jan24
Mar-week3	48	Jul23-Feb24
Apr-week3	42	Jul23-Mar24
May-week3	38	Jul23-Apr24
Jun-week3	24	Jul23-May24
Total	787	

Normal schedule resumes July23-June24

\* as of 2/14/2023



# Key Changes: Contracts & Grants







Kuali Module	What Does It Do?	Replaces
<b>Sponsored Programs</b>	<p><b>Kuali Sponsored Programs</b> integrates with <b>Oracle Project Portfolio Management (PPM)</b> and is an integral part of the Impact23 comprehensive suite of cloud-based solutions that will go live on July 5, 2023.</p> <ul style="list-style-type: none"><li>• Pre-Award: The <b>Proposal</b> module allows investigators and administrators to collaborate on proposals and enables proposal compliance with requirements at both the sponsor and institutional levels. Such module includes a system-to-system feature for building proposals for submission to Grants.gov (including errors and warning validations).</li><li>• Post-Award Management (Non-Financial): For awards that have been granted to the institution, award data is centralized and managed in the <b>Award, Report Tracking, and Subaward</b> modules.</li></ul>	<ul style="list-style-type: none"><li>• eCAF</li><li>• Cayuse Proposal System-to-System for Submission of Grants.gov Applications</li><li>• COEUS</li></ul>
<b>Compliance</b>	<ul style="list-style-type: none"><li>• <b>Kuali COI</b> is a secure, web based system for faculty and staff to submit and manage their conflict of interest disclosure activities.</li><li>• <b>Kuali Institutional Animal Care and Use Committee (IACUC)</b> is the research administration system for the submission and review of Animal Use Protocols (AUPs)</li><li>• <b>Kuali Institutional Review Board (IRB)</b> will be the research administration system for the submission and review of human subject research protocol applications.</li></ul>	<ul style="list-style-type: none"><li>• UCR AUP form</li><li>• UCR IRB form</li></ul>
<b>Build</b>	<p>With <b>Kuali Build</b>, UCR will replace homegrown applications/processes with custom forms and workflows. The form are designed specifically to send and automate requests or approvals to anyone on campus and know whose 'desk' it's on.</p>	<ul style="list-style-type: none"><li>• Pre-Award Spending Request System</li><li>• Material Transfer Request System</li><li>• eAward</li><li>• PI Eligibility Request by Exception System</li></ul>
<b>Export Control Management</b>	<p>The <b>Export Control Management</b> module will enable UCR to capture, track, monitor, and analyze its export control activities in one secure location. (Coming post go-live)</p>	<ul style="list-style-type: none"><li>• N/A</li></ul>



# Key Changes: Contracts & Grants

Oracle Project Portfolio Management (PPM) is the subledger/module where sponsored contracts and grants will be managed. Below is a view of the **Award Dashboard** that Faculty/PIs will use to access and view their awards.

**Manage Awards**

Search... Show Filters | Principal Investigator Chow-Yang Lee

**Search Results**

View + [Icons] Detach Create Award from Template

Primary Sponsor	Number	Name	Status	End Date	Principal Investigator	Total Funding Amount
SYNGENTA CROP PROTECTI...	K012885	Resistance monitoring of an isoxazoline compound in Blatt...	Active	12/31/2024	Chow-Yang Lee	272,091.00 USD
PROCTER & GAMBLE COMPA...	K011725	Laboratory evaluation of barrier repellent formulations agai...	Active	10/28/2026	Chow-Yang Lee	91,392.03 USD
CALIFORNIA DEPARTMENT O...	K012656	Evaluation of an artificial sweetener as potential bait toxica...	Active	06/30/2023	Chow-Yang Lee	110,938.00 USD
CORTEVA AGRISCIENCE-VJ7G	K012658	Corteva Termite Bait Comparison	Expired	08/20/2022	Chow-Yang Lee	5,000.21 USD

**Resistance monitoring of an isoxazoline compound in Blattella germanica in United States: Award Projects**

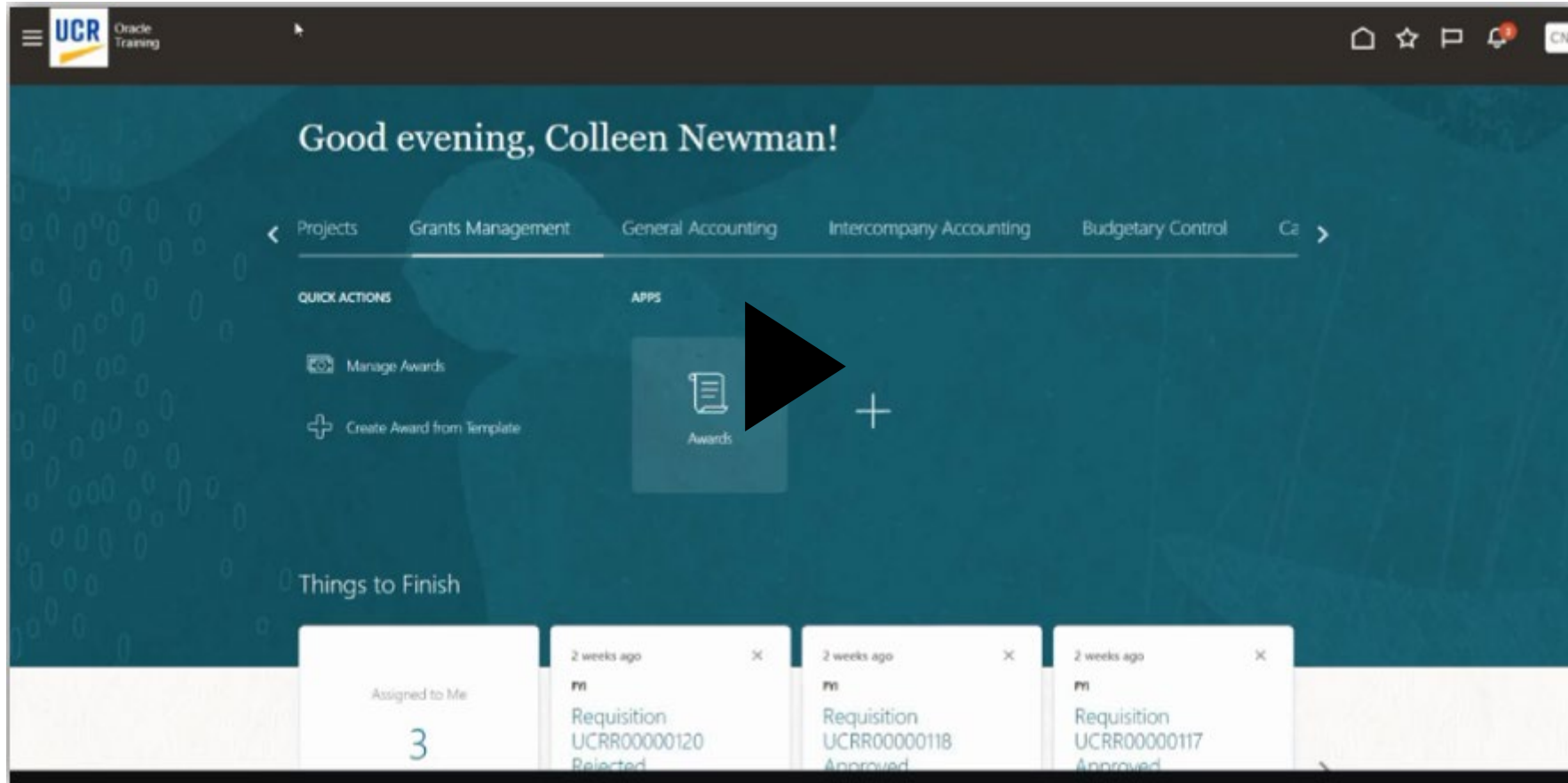
View [Icon] Detach

Project Name	Project Number	Project Status	Project Organization	Project Start Date	Project Finish Date	Funding Source	Budget Amount in Project Currency	Un An	Comm Amc F Cu
UCR-22020220 - LEE - ...	K012885001	Active	A01084 Entomology	12/08/2021	01/15/2025	SYNGENTA CROP PROTECTION LLC-V90I	68,022.75 USD	20	0.0



# Key Changes: Contracts & Grants

Click [here](#), or in the below image, to watch this video demo of the Awards Overview, Award Dashboard, and Award Details.





# Key Changes: Faculty Reporting

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- Faculty Funds will be in two separate modules – Oracle Budget (EPM) and Oracle Financials: Project Portfolio Management (PPM)
  - Oracle Financials: PPM will have the C&G balances based on the POETAF and is focused on inception to date reporting rather than fiscal year (note: Oracle Financial GL chart string is fiscal year oriented)
  - Oracle Budget will have all the non-C&G balances based on the COA
- The Oracle Budget report will not be beneficial until budgets are established in Flex2.
  - Day 1 activity for academic department staff is to transfer budgets from the default values to Flex2 (and Flex1) values
- Faculty have expressed a desire to have these 2 reports merged into 1 and so that will be completed after stabilization and possibly in the new data warehouse





# Key Changes: Faculty Reporting

## UCR PPM Prime PI Summary Report

UCR PPM Prime PI Summary Report								
			<b>Report Run Date</b>	03/12/2023				
<b>Award-Project Summary</b>								
<b>Prime PI</b>	Chow-Yang Lee		<b>Accounting Period</b>	Jan-23				
<b>Award Organization</b>	D01048 Entomology Dept		ITD indicates inception date through Accounting Period above					
<b>Project Organization</b>	<b>Prime PI</b>	<b>Project Number</b>	<b>Project Name</b>	<b>Award Number</b>	<b>Award Name</b>	<b>Accounting Period Expenditures</b>	<b>Total Budget</b>	<b>ITD Exper</b>
A01084 Entomology	Chow-Yang Lee	K011725001	UCR-20121551 - LEE - 10/28/2026 - PROCTER & GAMBLE COMPANY - LABORATORY EVALUATION OF BARRIER REPELLENT FORMULATIONS AGAINST GERMAN COCKROACHES - 87535	K011725	Laboratory evaluation of barrier repellent formulations against German cockroaches	0.00	91,392.03	
A01084 Entomology	Chow-Yang Lee	K012656001	21-PMG-R002 - LEE - 06/30/2023 - CALIFORNIA DEPARTMENT OF PESTICIDE REGULATION - EVALUATION OF AN ARTIFICIAL SWEETENER AS POTENTIAL BAIT TOXICANT AND AN INSECTICIDE SYNERGIST AGAINST GERMAN COCKROACHES, AN IMPORTANT INDOOR PEST OF - 80231	K012656	Evaluation of an artificial sweetener as potential bait toxicant and an insecticide synergist against German cockroaches, an important indoor pest of	0.00	110,938.00	
A01084 Entomology	Chow-Yang Lee	K012658001	2021-01 - LEE - 08/20/2022 - CORTEVA AGRISCIENCE - CORTEVA TERMITE BAIT COMPARISON - 87693	K012658	Corteva Termite Bait Comparison	0.00	5,000.21	

Example 2\_Prime PI Summary Report: [UCR PPM Prime PI Summary Report\\_Output sample.xlsx](#)



# Key Changes: Faculty Reporting

## Faculty Non Project Portfolio Summary Report

**Parameters:**

Business Unit: UCR  
 Fiscal Year: FY22-23  
 Activity: ALL  
 Function Program: Total Function  
 Fund: All Fund  
 Account: All Account  
 Flex1: All Flex1  
 Flex2: F0008971-Kim: Maria  
 Accounting Period: Mar-23

Select a Faculty Name from Flex2

Select the Accounting Period

Flex1 can provide additional details

Generally, Flex2 will only be budgeted for Temp Budget

Total General Ledger (GL) Working Budget = Perm + Temp

Balance w/Encumbrances shows the uncommitted or available balance

ACTIVITY	FUND	FUNCTION PROGRAM	FLEX1	BUDGET CATEGORY	PERM BUDGET	TEMP BUDGET	TOTAL GL WORKING BUDGET	EXPENDITURES	BALANCE	Encumbrances	BALANCE W/ ENCUMBRANCE
A01563-Biomed Sci Initial Compl Funds	19900-GENERAL FUNDS	44-000_Default Program	D02000A003-Faculty Bridging Funds	BC40-BC Travel	0	20,000	20,000	127	19,873	-	19,873
				BC42-BC Services Other	0	30,000	30,000	6,313	23,687	-	23,687
				BC60-BC Equipment & Other Inventorial	0	400,000	400,000	0	400,000	392,654	7,346
				<b>Fund Subtotal</b>	<b>0</b>	<b>450,000</b>	<b>450,000</b>	<b>6,439</b>	<b>443,561</b>	<b>392,654</b>	<b>50,906</b>
A01619-BMSC Designated	37658-PRESIDENTS ENDOWMENT	62-000_Default Program	D02000A015-Seed Grant	BC40-BC Travel	0	2,000	2,000	4,503	-2,503	-	-2,503
				BC43-BC Mail Services & Freight	0	500	500	62	438	-	438
				BC44-BC PrintingRepro & Media	0	600	600	720	-120	0	-120
				BC75-BC Unallocated	0	11,900	11,900	0	11,900	0	11,900
<b>Fund Subtotal</b>	<b>0</b>	<b>15,000</b>	<b>15,000</b>	<b>5,285</b>	<b>9,715</b>	<b>0</b>	<b>9,715</b>				

All activities and funds will appear where Flex2 has been budgeted and used in expense transactions

[EPM Faculty Non-Project Portfolio Summary Report sample.xlsx](#)



# TRAINING

Academic Learner Pathway

# Finance Administration & Practices (UC Learning Center Library)

Key: New Courses Currently Available Post Go-live UCR

	Foundational Training	Department Requestor	Department Analyst	Financial Managers & CFAO	Faculty, Researcher & PD/PI	Other Sub-Libraries	
WBT	Oracle: Budget & Financial Systems Introduction	Oracle: Buying and Paying	Oracle: Budget & General Ledger	Oracle: Financial Management	UCR Finance and Research Systems for Academics	Specialized Processes & Programs	Legacy Library
	Oracle: UCR Chart of Accounts	Concur: Travel and Non-Travel Reimbursements	Oracle: Project Portfolio Management for Contracts & Grants	Reporting Tools & Dashboards	Oracle for Academics	SAA Training	Introduction to the Full Accounting Unit (FAU) Online
	Reporting Tools & Dashboards	ePay: Reimbursement Requests	Oracle: Budget Development	Oracle: Financial Approvals	Kuali & Oracle: Contracts & Grants for Academics	PCard Training	Purchasing: SAA for eBuy
	Oracle: Financial Boundary Systems & Tools				Concur for Academics	Travel & Entertainment Card	SAA/EACS Training
ILT	Oracle: Reporting Tools & Dashboards Workshop	Oracle: Buying and Paying Workshop	Oracle: Budget Workshop	Oracle: Financial Management Workshop	Contracts & Grants for Academics Workshop	PCI DSS Security Awareness Training (SAT)	PIWRS: Annual Certification Online Tutorial
		Oracle: Project Portfolio Management for Contracts & Grants Workshop	Oracle: Financial Management Reporting Workshop	UCR Finance and Research Systems for Academics Workshop		Cash Handling: The Basics	PIWRS: Monthly Expenditure and Payroll Review Tutorial
						Enterprise Accountability Online	PIWRS: Principal Investigator Web Reporting System Tutorial
						Foundation Gift Fund Details Report Overview	
						Advanced Financial Reporting	





# Academic Learner Pathway

**Faculty,  
Researcher &  
PD/PI**

**Web Based Training:  
Available On Demand**

UCR Finance and Research  
Systems for Academics

Oracle for Academics

Kuali & Oracle: Contracts & Grants  
for Academics

Concur for Academics

**Instructor Led Training/Workshops:  
Available Live**

Contracts & Grants  
for Academics Workshop

UCR Finance and Research Systems  
for Academics Workshop

- Opportunities to engage in knowledge building via early learning opportunities started in February 2022
- The XCITE Center for Teaching and Learning has been engaged to develop training
- Web Based Training will be available after April 2023 on the UC Learning Center
- Instructor led case study workshops will be held around go-live (July 2023), Fall 2023 and as needed
- UCR has invested in **Oracle Guided Learning** that will provide users with real time guidance as they are navigating within Oracle Financials and Oracle Budget.

# PREPARATION

Faculty Preparedness



# Be Prepared

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**As the go-live date (July 2023) nears, connect with your department staff to assist with:**

- Converting current chartstring into the new COA chartstrings and POETAF values
- Spending down small balances
- Awareness of upcoming award deadlines and ensure submission in advance of transition to Quali (e.g. pre-awards, no-cost extension)
- Anticipating procurement needs and submitting requests early
- Applying for a Corporate T&E Card
- Documenting eBuy shopping lists

Faculty and their 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

# Impact23 Key Resources

- [Impact23 Program Scope](#): A wide range of financial applications are changing, this page outlines the impacted financial systems
- [Impact23 Program Team](#): Meet the individuals (in your area) participating in the program
- [Impact23 Insider Newsletter](#) available online
- [Impact23 Event Calendar](#) for events, due dates, and learning opportunities
- [Request & Fiscal Close](#) department cutover and fiscal close activities/due date

*The Full Accounting Unit (FAU) will be replaced by a new Chart of Accounts (COA). This is a critical change for the campus. Below are resources to help you understand the new Chart of Accounts.*

- [Chart of Accounts & POETAF Overview](#)
- [Chart of Accounts One Pager](#)
- [POETAF One Pager](#)
- [Town Hall - Event Recording](#)
- [Round Table Discussion - Event Recording](#)
- [Golden Tree Viewer](#) (search and navigate the new chart field trees)

The image displays two overlapping screenshots from the UC Riverside Impact23 website. The top screenshot shows the main website interface with a navigation menu and a banner for the 'Impact23 Summit'. Below the banner are sections for 'Event Calendar' and 'Recorded Events', followed by an article titled 'Modernizing UC Riverside's Financial'.

The bottom screenshot is an 'IMPACT23 INSIDER NEWS' newsletter. It features a 'January 2023 | 6th Edition' header and an 'ANNOUNCEMENTS' section. The primary announcement is titled 'Impact23 Procurement Preparation Activities for Departments', detailing the transition from eBuy to Oracle Procurement. A secondary announcement is titled 'ORACLE PROCUREMENT PUNCHOUT DAPO PREVIEW', which includes a video player showing a requester completing a DAPO from a punchout catalog.

**THANK YOU!**

**IMPACT23: Modernizing UC Riverside's Financial Systems**

**EMAIL: [Impact23@ucr.edu](mailto:Impact23@ucr.edu)**  
**WEBSITE: [Impact23.ucr.edu](http://Impact23.ucr.edu)**

