



# Faculty & Staff Town Hall

May 25, 2023

# Agenda

UC Riverside has embarked on an important effort to update financial processes and systems across the campus. The program team hosts Town Halls as part of our efforts to prepare and educate the campus' faculty and staff on related changes and preparation activities.

This Town Hall is recorded and will be posted to the Impact23 website under News & Events ([Recorded Events](#)).

TOPIC	PRESENTER
Welcome & Timeline	Asirra Suguitan
Kuali Sponsored Programs	Charles E. Greer, Jr.
Oracle COA Management	Stephanie Flores
Data Warehouse Update	Josh Hoerger
Payroll Certification & Fixed Price Conversion	Bobbi McCracken
Subaward Basics	Linda Casteel
Training & Support	Program Team
Question & Answer	Josh Hoerger

# Impact23 Program Timeline & Testing

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**Asirra Suguitan**  
*Impact23 Program  
Functional Lead*



# Modernizing UC Riverside's Financial Systems



	2022			2023							2024													
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul		
<b>Program Timeline</b>	<b>Convert, Test, &amp; Train</b>								<b>Cutover</b>	<b>Implementation Support &amp; Stabilization</b>														
<b>Campus Participation</b>				+ Extended Testers				User Training																
<b>System Configuration &amp; Deployment</b>	Oracle Budget & Oracle Financials								Concur Travel & Expense Phase 2							Kuali Sponsored Programs								
<b>Remediate or Replace Integrated Financial Apps</b>	Work Order Systems --> ServiceNow								Data Warehouse Phase 2							Test 2								
	Test 2			Test 3																				

# COUNTDOWN TO JULY 1, 2023



CALENDAR  
DAYS

36

# Kuali Sponsored Programs

Revised S2S Timeline

**Charles E. Greer, Jr.**

*AVC for Research Administration  
and Compliance/RED*



# Kuali Sponsored Programs (S2S)

## Kuali Sponsored Programs to be released in two phases:

- **PHASE 1:** Launch Kuali SP on July 5th, with the exception of the System to System (S2S) submission for federal proposals via Grants.gov. For S2S submissions, the campus will continue to use Cayuse. This approach will provide the campus with additional time during the summer for training and familiarization with the S2S functionality in the Kuali SP sandbox environment.
- **PHASE 2:** Launch the Kuali System to System (S2S) feature, scheduled for implementation in the Fall of 2023.



# Oracle COA Management

## Deployment Overview

**Stephanie Flores**

*Impact23 COA Co-Lead and*

*Executive Director*

*Financial Planning & Analysis*





# Oracle COA Management



## Current

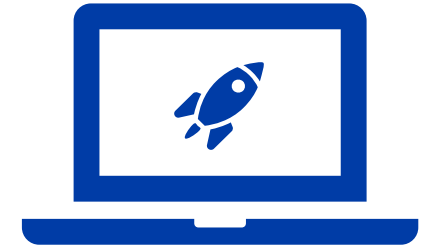
Take the LMS Training course that explains the new COA and demonstrates how to make requests in Oracle COA Management: ***UCR Chart of Accounts***



## Week of 6/12

The targeted timeframe for making Oracle COA Management roles available for Department SAAs to provision in EACS.

**Note:** CFAOs (or their delegate) will need to approve all requests, which may limit the number of staff provisioned in EACS to start.



## Mid-June

The targeted timeframe for releasing Oracle COA Management to campus, so that requests can be entered for Activity/Flex 1 segments.

**Note:** Approvals need to build in time for UCPath updates depending on the request.

# Data Warehouse Update

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Revised Looker Timeline

**Josh Hoerger**

*Impact23 Program*

*Functional Project Manager*



# New Data Warehouse Timeline – Update

- Looker is the Impact23 SC approved data warehouse for the Oracle implementation, replacing functionality from both UCRFS Totals and SuperDOPE.
  - Though this was proposed as a “Day One” system, after review and consideration, the Impact23 Steering Committee has approved that this instead be deployed on or before Aug. 1, 2023 (still with data starting from July 2023).
  - The later deployment date is to allow cross-functional teams to:
    - Review the initial data into the data warehouse to validate it is working correctly
    - Finalize data descriptions
    - Confirm availability of a sufficient volume of data to be meaningful for users once they can access it
- Respective Impact23 program teams will socialize alternate locations for reports and data availability in the interim period until the data warehouse is available.

# Payroll Certification

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## Revised Transition Plan

**Bobbi McCracken**  
*AVC & Controller*  
*Impact23 Co-Sponsor*



# Payroll Certification – Revised Transition Plan

- Due to system limitations and feedback from the faculty advisory workgroup, the Payroll Certification transition schedule needs to be simplified from the original plan previously communicated.
  - Cycles reduced from eleven to one
  - Listing of awards will be available to department coordinators in June
  - Certifications will be available to coordinators for review in late July
    - Coordinators will have 30+ days to review certifications before they are released to PIs
  - Certifications will be released to PIs in early September
    - PIs will have 30 days to certify
  - Generic, not fund-specific, emails and reminders will be distributed
- The revised plan was reviewed by the PPM Workgroup, including the extended tester, and FHROG. They supported the change.

# Payroll Certification – Revised Transition Plan

## Proposed Payroll Certification Transition Schedule *(Revised 5-15-2023)*

OLD FAU by Fund		New COA by Award			
PRC Pay Periods Covered	REVISED	REVISED	PRC Pay Periods Covered		
normal schedule July 22-June23	normal schedule July 22-June23; distributed to coordinator 7/12; distributed to PI 7/22; due 8/15				
Aug22-Jun 23	Listing of upcoming FAU based certifications distributed of coordinators on 6/15 to gather cost sharing; PRC distributed to coordinator 7/25 (generic notice); PRC distributed to PI 9/1 (generic notice); PRC due 9/30	Distributed to coordinator 9/15; distributed to PI 10/1; due 10/25	Jul-23	Partial budget year	
Sept22-Jun23		Distributed to coordinator 10/1; distributed to PI 10/15; due 11/5	Jul23-Aug23	Partial budget year	
Oct22-Jun23		Distributed to coordinator 10/15; distributed to PI 10/25; due 11/15	Jul23-Sep23	Partial budget year	
Nov22-Jun23		Distributed to coordinator 11/10; distributed to PI 11/20; due 12/15	Jul23-Oct23	Partial budget year	
Dec22-Jun23		Distributed to coordinator 12/10; distributed to PI 12/20; due 1/15	Jul23-Nov23	Partial budget year	
Jan23-Jun23		Distributed to coordinator 1/10; distributed to PI 1/20; due 2/15	Jul23-Dec23	Partial budget year	
Feb23-Jun23		Distributed to coordinator 2/10; distributed to PI 2/220; due 3/15	Jul23-Jan24	Partial budget year	
Mar23-Jun23		Distributed to coordinator 3/10; distributed to PI 3/20; due 4/15	Jul23-Feb24	Partial budget year	
Apr23-Jun23		Distributed to coordinator 4/10; distributed to PI 4/20; due 5/15	Jul23-Mar24	Partial budget year	
May23-Jun23		Distributed to coordinator 5/10; distributed to PI 5/20; due 6/15	Jul23-Apr24	Partial budget year	
Jun-23		Distributed to coordinator 6/10; distributed to PI 6/20; due 7/15	Jul23-May24	Partial budget year	
			Normal cycle/schedule	July23-June24	First Full budget year under new COA

# Fixed Price Conversion

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**Josh Hoerger**

*Impact23 Program*

*Functional Project Manager*



# C&G Fixed Price Conversion

- Surplus Balances on completed Fixed Price Awards will not be converted into the PPM module, rather surpluses will be transferred to new Org Sales & Service Funds.
  - Expired awards, with no FY23 activity, transfer will occur on May ledgers
  - Expired awards, with FY23 activity, transfer will occur on June ledgers
  - PI and UCRFS fund will be referenced on the transfer
    - 60650 - CNAS FIXED PRICE SURPLUS
    - 60651 - BCOE FIXED PRICE SURPLUS
    - 60652 - CHASS FIXED PRICE SURPLUS-pending establishment
    - 60653 – SCH OF BUS FIXED PRICE SURPLUS-pending establishment
    - 60654 - RED FIXED PRICE SURPLUS-pending establishment
    - 60655 - VCSA FIXED PRICE SURPLUS-pending establishment
    - 60656 - SPP FIXED PRICE SURPLUS-pending establishment
    - 60657 - SOM FIXED PRICE SURPLUS-pending establishment
- The full indirect cost will be assessed before transfer
- **Action Required:** Units create Oracle budgets using the appropriate Flex 2 values



# Subaward Basics

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**Linda Casteel**

*Impact23 Banking Lead*



# Subawards and Multi-Campus Awards (MCAs) in Oracle

- Outgoing external subawards and MCAs will be recorded in Oracle as Purchase Orders
  - The PO is created/amended by Extramural Funds (EMF) upon receipt of documentation from Sponsored Projects Administration (SPA)
  - The PO number will begin with "S" for external subawards and "MCA" for multi-campus awards
  - All subaward and MCA invoices will route via Oracle to the PI for approval. The designated "UCR Grant Department Analyst(s)" will receive an Oracle courtesy notification as well a UCR email notification
  - Both external subawards and muti-campus awards will be included in the PO Encumbrance Balance Report and the UCR Purchase Order Detail Report
  - Current state open external subawards and MCAs will be migrated to Oracle shortly after go-live

# Training & Support

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*Impact23 Functional Program  
Management Team*



# Impact23 Training Program is Now Available!

Web-based training and workshop registrations are available in the UC Learning Center under [Finance Administration and Practices](#) to introduce staff and faculty to new Impact23 applications and business processes!

The screenshot shows the UC Learning Center interface. On the left sidebar, the 'Finance Administration and Practices (39)' category is selected and highlighted with a yellow border. Below it, a list of sub-topics is visible: 1. Foundational Training (5), 2. Department Transactor (4), 3. Department Analyst (5), 4. Financial Managers & CFAO (5), 5. Faculty, Researcher, & PD/PI (7), 6. Specialized Processes & Programs (9), and 7. Legacy Library (6). The main content area displays a search bar with '5 of 5 results for \*\*\*'. Below the search bar, there are five training items listed:

- 1 - Oracle: Budget & Financial Systems Introduction** (ECOURSE, RI-ACECO0047, 45m)
- 2 - UCR Chart of Accounts** (ECOURSE, RI-ACECO0072, 45m)
- 3 - Reporting Tools & Dashboards** (ECOURSE, RI-ACECO0067, 45m)
- 4 - Oracle: Financial Boundary Systems & Tools** (ECOURSE, RI-ACECO0082, 1h 20m)
- 5 - Oracle: Reporting Tools & Dashboards Workshop** (ILT COURSE, RI-ACILT0045, 2h)

- Next SAA Training is on June 6<sup>th</sup> @1:30. [Click here to register.](#)
- Complete the learning paths in the order they are presented – [learn more.](#)
- Workshops are hands-on sessions to get into the new system and practice.
- Though some courses are optional, other courses are required to register for the associated workshop (for example, the Buying and Paying web-based training and the Buying and Paying workshop).



# UC RIVERSIDE IMPACT23 TRAINING PROGRAM

## Kuali Sponsored Programs Training

- **Week of June 5**

Web-Based Training (WBT) for Kuali SP Proposal Development & COI will cover the fundamentals of Kuali SP Proposal Development and Conflict of Interest (COI) processes.

- **Week of June 12**

The Web-Based Training (WBT) or Simulation for the Detailed Budget training module will concentrate on providing step-by-step guidance to users on how to construct a Detailed Budget within Kuali SP.

- **Summer 2023**

The Web-Based Training (WBT) or Simulation for the S2S training module will focus on offering users step-by-step guidance on utilizing the Kuali System to System (S2S) feature. The training will specifically cover the process of preparing federal proposals for submission through Grants.gov via Kuali S2S.

# CUTOVER & FISCAL CLOSE

## ■ Cutoff Date Change

UCRFS/PeopleSoft Staffing:

- Last day to submit staffing entries **6/15**
- Department blackout period for Staffing Application by ORG **6/16 – 6/30**.

## ■ Cutover & FYE Close Webpage

[Cutover & Fiscal Close | Impact23 \(ucr.edu\)](#)

## ■ Impact23 Calendar

[Impact23 Calendar | Impact23 \(ucr.edu\)](#)

- Filter by “Key Dates & Deadlines”
- Click “Agenda” for a list view by day

**Impact23 Calendar**  
Today June 2023

Print Week Month Agenda

- Office Hours
- Key Dates & Deadlines
- Training
- Town Halls
- User Groups
- Impact23 Events

**Thursday, May 25**  
End of fiscal year scholarship/stipend requests should be submitted to the SFA Office.

**Monday, May 29**  
Last day for Departments/PIs to provide subaward verification form submissions.

**Thursday, June 1**  
Last day for Department to request new detail codes with FAUs or change to FAUs is 6/1/2023. Department P

**Friday, June 9**  
Last day to submit a request for a Guest Traveler in the Vendor Request System for use in Concur.

**Monday, June 12**  
Last day for department PreAward submissions.  
Last day for departments to submit SCT requests to SSC (due to UCPath scheduled maintenance).  
Last day to submit a request for a Supplier in the Vendor Request System for use in ePay.  
Last day to submit approved gifts under FAU is 6/16. Please check your unit's gift revenue accounts (G  
Last day to submit travel expense reimbursements and clear Corp Travel Card expenses using FAU

**Friday, June 16**  
Last day to submit a request for a Supplier in the Vendor Request System for use in eBuy.

**Tuesday, June 20**  
Last day eCAF submission; This is the last date researchers can submit an eCAF for proposals\* due c

**Wednesday, June 21**  
Last day for department PAMIS BEA submissions in eAward; must have the budget category breakdo

Google Calendar

# Engagement Opportunity

Join us for the next Impact23 User Group. This user group provides a space for sharing more detailed decisions and updates regarding the future state financial system.

**Tuesday, June 13, 2023, from 11-12:30 pm.**

**Link to Join»** <https://ucr.zoom.us/j/98619088456>



# Impact23 Support Strategies

## **Campus collaboration: campus-wide involvement is essential for a successful implementation**

- SMEs, SMAs, and Extended Testers serve as valuable resources for both the campus and the organization, contributing to training and stabilization efforts.
- Involvement of SMEs and SMAs in design and review sessions has provided them with extensive exposure to the new systems compared to other campus members.
- SMEs, SMAs, and Extended Testers have participated in testing.
- SMEs and SMAs have been actively engaged and invited to contribute to training development meetings.
- Reviewing training materials and providing feedback to enhance training quality is a task assigned to SMEs, SMAs, and Extended Testers.
- SMEs, SMAs, and Extended Testers play a crucial role in assisting the department and organization in the development of new operating procedures and internal controls.

**REMINDER:** Training can provide instruction on the tools; however, each unit will need to operationalize its processes based on how the unit is staffed and organized.



# IMPACT23 SUPPORT

## Department Support by Type



OR



### Self-Help

**Grow Knowledge with On-demand, Self-help Resources!**

- Training
- Website
- Guided Learning

### Community of Practice

**Enter your general inquiry in the channel for assistance!**

- Impact23 departmental/ORG tiger team members are standing by to help answer your inquiry, share their knowledge, and help guide you

### ServiceNow Ticket


**Still Need Help?**

Enter a ticket online **or** call the Impact23 Finance Help Line to reach the appropriate concierge!

Concierge Service Areas:

- Budget
- Concur Travel & Expense
- Grants & Contracts
- Procure to Pay
- Financial Reporting

### Concierge Zoom Line



## Question & Answer

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Enter your questions  
in the Q&A feature



**Thank you!**

Email: [Impact23@ucr.edu](mailto:Impact23@ucr.edu)  
Website: [Impact23.ucr.edu](http://Impact23.ucr.edu)