UC RIVERSIDE
IMPACT23

Faculty & Staff Town Hall

July 27, 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.

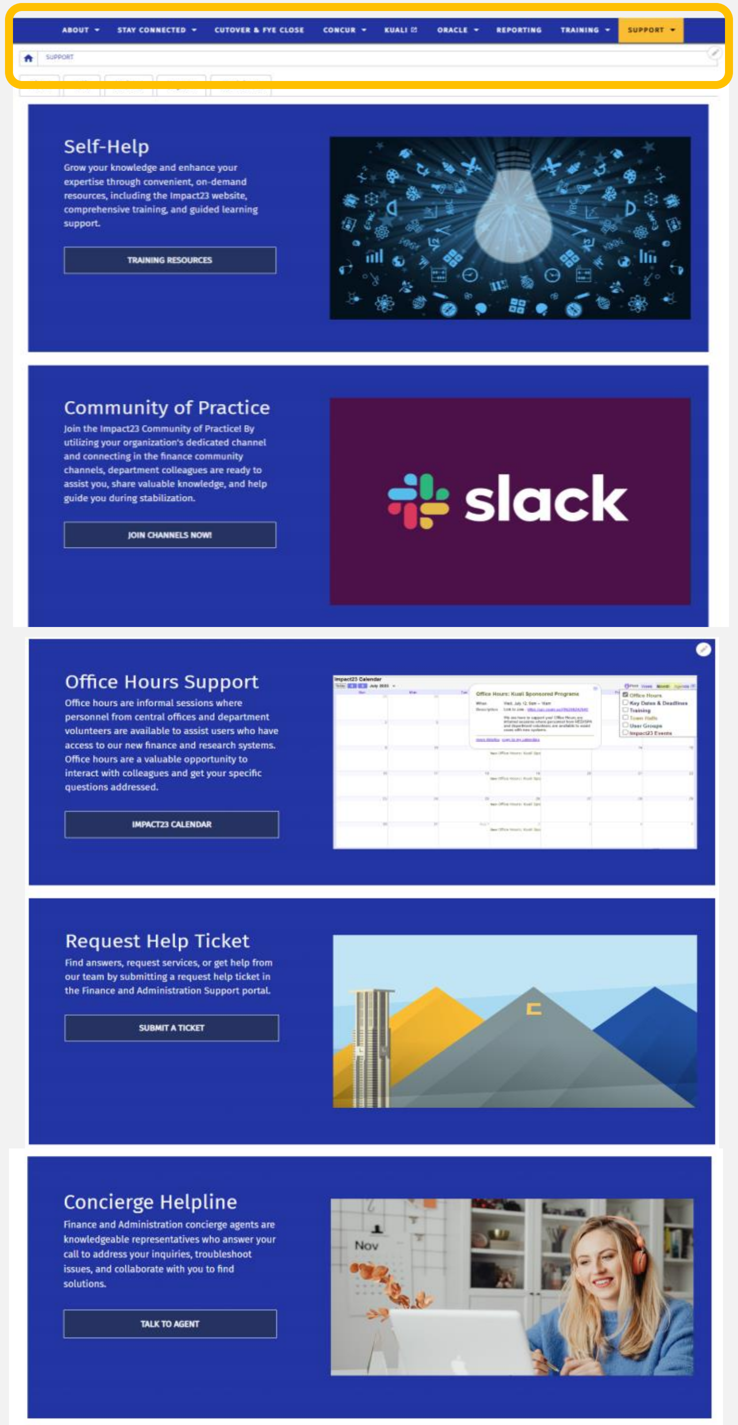
This Town Hall is recorded and will be posted to the Impact23 website under News & Events (Recorded Events).

TOPIC	PRESENTER
Welcome & Timeline	Asirra Suguitan & Gerry Bomotti
Stabilization Channels & Metrics	Josh Hoerger
Deployment Updates	Stephanie Flores & Bobbi McCracken
Training Updates	Helen Kotke
Question & Answer	Josh Hoerger

Stabilization Metrics

Stabilization Channels

Josh Hoerger
BFS Financial System Project Manager



Tier 1: Self-service options include training, Oracle Guided Learning (OGL), and information on the website. OGL guides can be printed or emailed for step-by-step instructions.

Tier 2: Ask your peers for help using SLACK channels. There are two types of channels: Org-channels and Community of Practice channels. Department SMAs and Extended Testers are supporting inquiries and helping identify issues during stabilization. If your question or problem persists, attend Office Hours and/or submit a ticket!

Tier 3: Reach out to the Concierge team for further assistance. You can submit a ticket in the Finance & Administration Support portal and click "Request Help," or call the Concierge helpline at **951-827-9990**. Agents are available M-F from 9 am to 4 pm (closed for lunch from 12 - 1 pm).

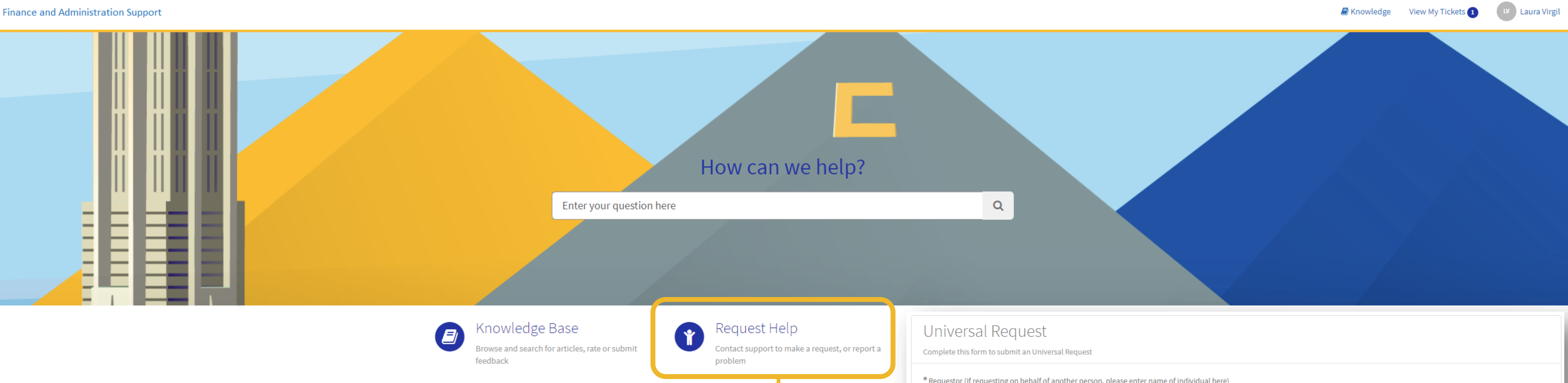
To ensure efficient handling of your inquiries, we request that you submit them through either the portal or the concierge helpline, to minimize multiple records and speed up our response times. We appreciate your support!

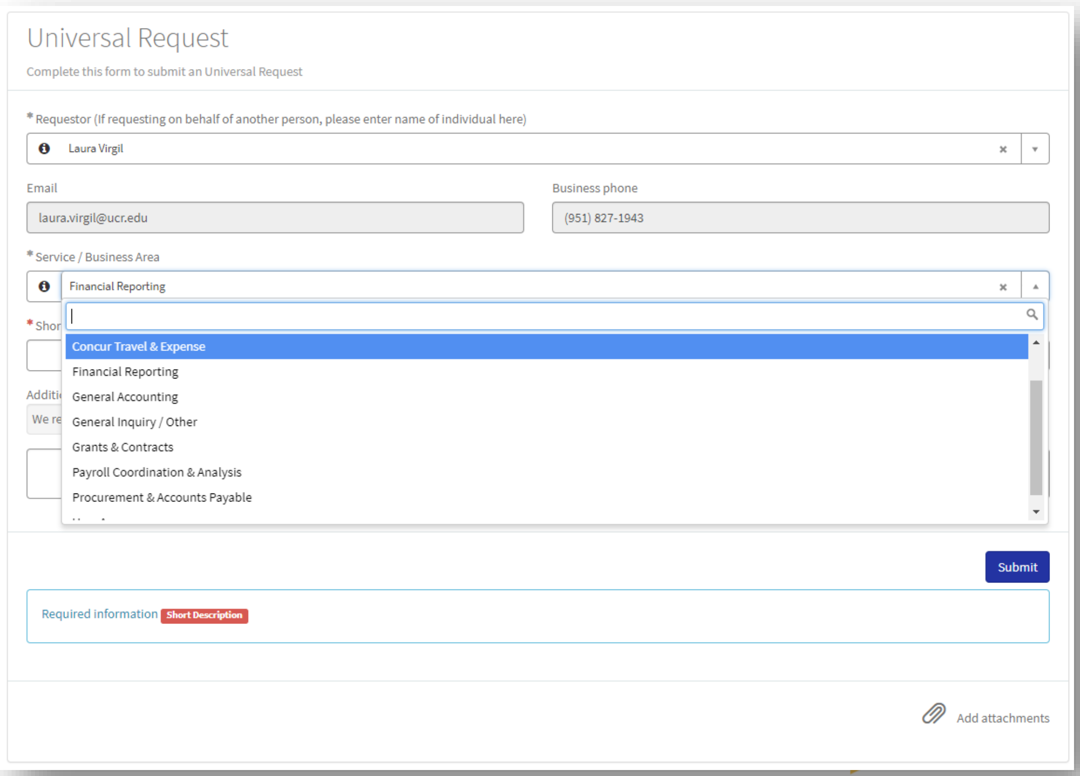
Office Hours Support

Office hours are informal sessions where personnel from central offices and department volunteers assist users who have access to our new finance and research systems. ***Past Office Hour recordings are being added to the webpage!***

Topics Related To	Office Hours Schedule	Link to Join
Boundary System& COA Guidance (Work Order, UCPath, and Banner)	Wednesdays, 3–3:30 pm	https://ucr.zoom.us/j/93787188359
Budget & Oracle COA Management	Thursdays, 3-3:30 pm	https://ucr.zoom.us/j/97174619680
Financial Reporting	Tuesdays, 3–3:30 pm	https://ucr.zoom.us/j/95567817621
Kuali Sponsored Programs (Proposal Development & Related Forms)	Wednesdays, 9–10 am	https://ucr.zoom.us/j/95269242540
Post-Award for Contracts & Grants	Mondays, 9:30–10 am	https://ucr.zoom.us/j/97925305538
Procure to Pay and PCard	Fridays, 10:30-11 am	https://ucr.zoom.us/j/94472310691
Travel/Non-Travel Reimbursements & ePay	Mondays, 10:30-11 am	https://ucr.zoom.us/j/98498457403

Finance and Administration Support - ServiceNow



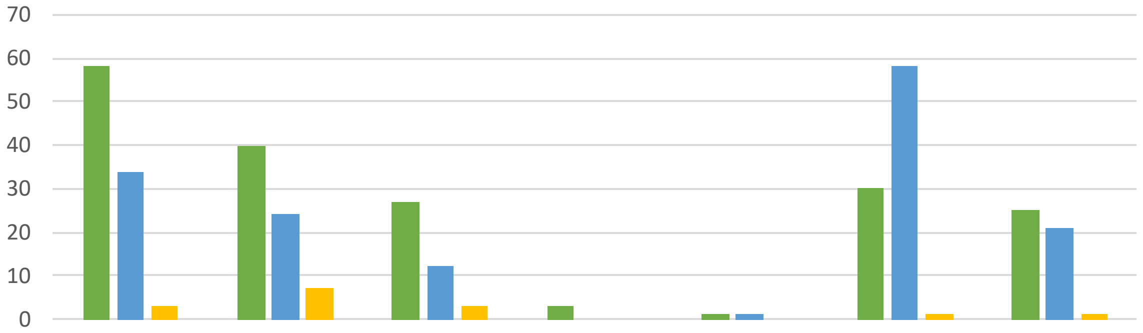


- https://ucrsupport.service-now.com/finadmin_portal
- Support for Impact23, spanning Business & Financial Services (BFS), Financial Planning & Analysis (FP&A), and Research and Economic Development (RED), with integration to ITS's ServiceLink for coordination.

Stabilization Summary as of 7/25/2023

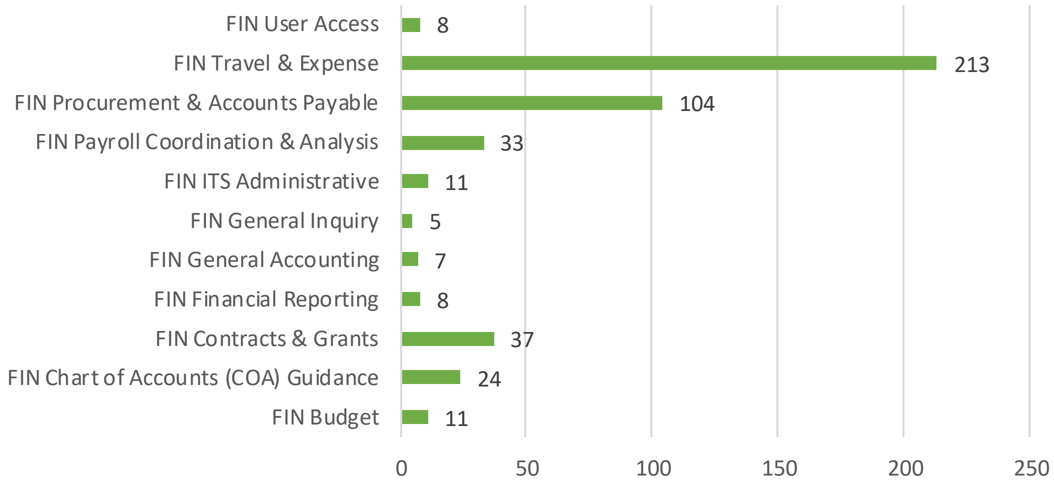
Business Days Live	Total Active Users	Closed Tickets	Open Tickets	Total to Date
15	791	309	263	572

7 Day UR Count



	7/19/2023	7/20/2023	7/21/2023	7/22/2023	7/23/2023	7/24/2023	7/25/2023
Open	58	40	27	3	1	30	25
Closed	34	24	12	0	1	58	21
Awaiting Response	3	7	3	0	0	1	1

Open UR's by Assignment Group



Finance and Administration - Concierge Helpline

Concierge agents are knowledgeable representatives who can address your inquiries, troubleshoot issues, and collaborate with you to find solutions.

Hours of Operation

Monday – Friday: 9:00 am – 4:00 pm

Closed for lunch from 12:00 p.m. - 1:00 p.m.

SERVICE AREAS COVERED*

Call the Concierge Helpline at (951) 827-9990 with questions related to:

Press 1 for Budget
Press 2 for Financial Reporting
Press 3 for Contracts and Grants
Press 4 for Procurement and Accounts Payable
Press 5 for Travel and Expense
Press 6 for all Other Inquiries

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Stabilization Summary as of 7/25/2023

- 72% of calls were answered by a Concierge Agent
- Procurement and Budget queues have the highest volume of callers
- The average duration of a call is 3 minutes

Concierge Calls
186

Call Group	Total Calls
All other Inquiries	35
Budget	43
Financial Reporting	12
Grants & Contracts	15
Procurement & Accounts Payable	54
Travel & Expense	27
Grand Total	**186**

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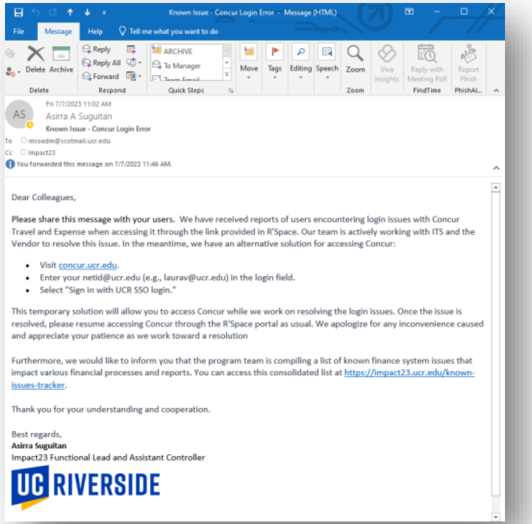
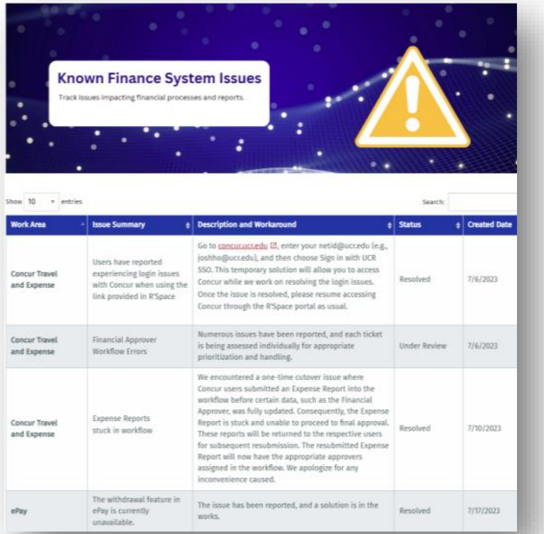
Communication of Key Issues & Resolutions

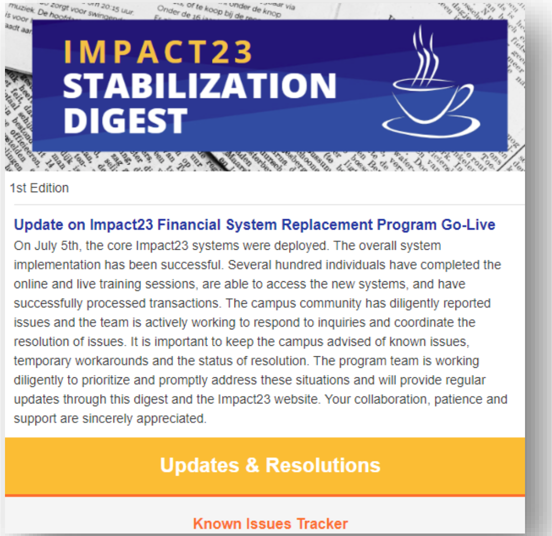
1 Targeted Emails



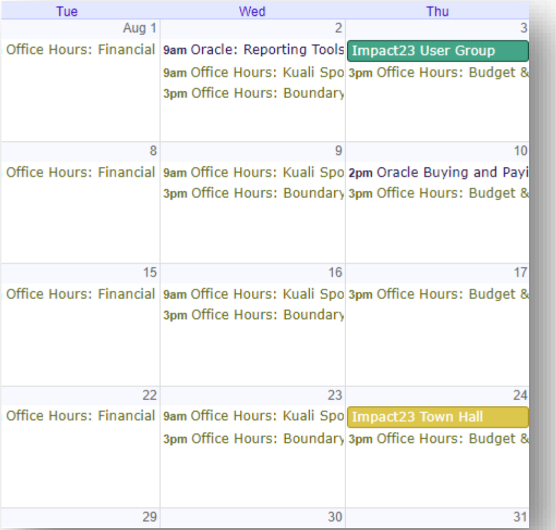
2 Known Issues & CoP



3 Stabilization Digest



4 User Group: **8/3 @2pm**



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Deployment Updates

Stephanie Flores

Bobbi McCracken

Oracle Budget

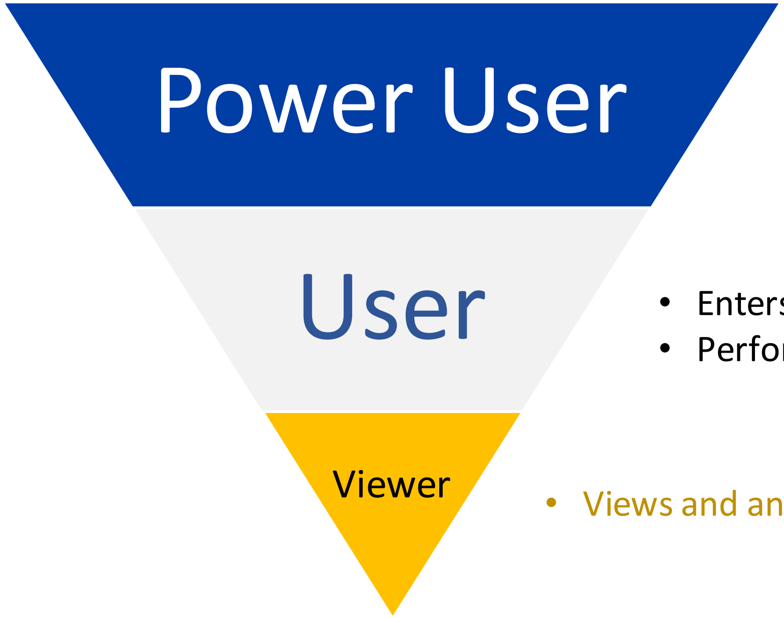
- Final 6/30 Perm Budgets were loaded this week. The 5/31 cash balances for non-Perm Funds were loaded for Go-Live so that all funds would be available in Oracle Budget. The budget instructions were to have your Perm Budgets where you needed to spend in FY24. If that did not occur, then you need to do a temporary budget adj in Oracle Budget between your activity where the Perm Budget is and the activity where you are trying to spend while you wait for the 6/30 balances to be loaded in mid-August.
  - This is one of the main reasons for the errors that transactors are receiving.
  - Recommendation – Run the Activity Summary in Oracle Budget to view the budget

- We are aware that problems with Inter Org transfers and are currently testing a fix in the test environment. Additionally, we have a ticket in with Oracle regarding the cross-validation rules of COA combinations which is creating challenges with budget transfers via Inter/Intra Org transfers for financial aid transfers. FP&A is working directly with Grad Division and UG Financial Aid on work-around until resolved.

- The Budget Workgroup is currently reassessing reports in Oracle Budget with the aim of enhancing user-friendliness and improving the overall layout.

Oracle Budget in EACS - Department SAAs

Critical Concept: In Oracle Budget, each higher-level role in the hierarchy has the access/capabilities of the roles below it.



- Creates and maintains forms and financial reports
- Controls the approval process
- Loads data using Data Management

- Enters data into forms and submits for approval
- Performs ad-hoc analysis on forms and in Smart View

- Views and analyzes data through forms, reports, and Smart View

- <u>Do not</u> provision Power Users as a User or Viewer
- <u>Do not</u> provision a User as a Viewer
- Users will need to be provisioned for each department they need to manage
- A Viewer should only be provisioned once

Name	ORG-Power Users
Gupta, Shelley	21
Kreuter, Shellee	40
Lai, Kennett	13
Latham, Eric	15,35
Levario, Luisa	25,38
Manor, Laura	24,41
McDade, Kim	26
McFadden, Susan	28,30
Meumann, Katie	11
Miller, Sarah	18
Phung, Yung	14
Rackstraw, Alissa	11
Roddy, Susana	32,33,36
Rodriguez, Alison	10,37
Rodriguez, Jackie	20,31,42
Ruiz, Veronica	19,20,28,30,31,39,42
Smith, Dylan	40
Tapia, Yadira	28,30,39
Tavizon, Sally	10,37
Williams, Cindy	12
Aldana, Maria	40
Alvarez, Luis	25
Bates, Jacqueline	16
Calloway, Katrice	12
Cason, Sean	32,33,36
Cortez, Cherysa	18
Dacanay, Chris	19
Farias, Jennifer	14
Gerry, Cheryl	22
Gonzales, Andrea	22

Chart of Accounts

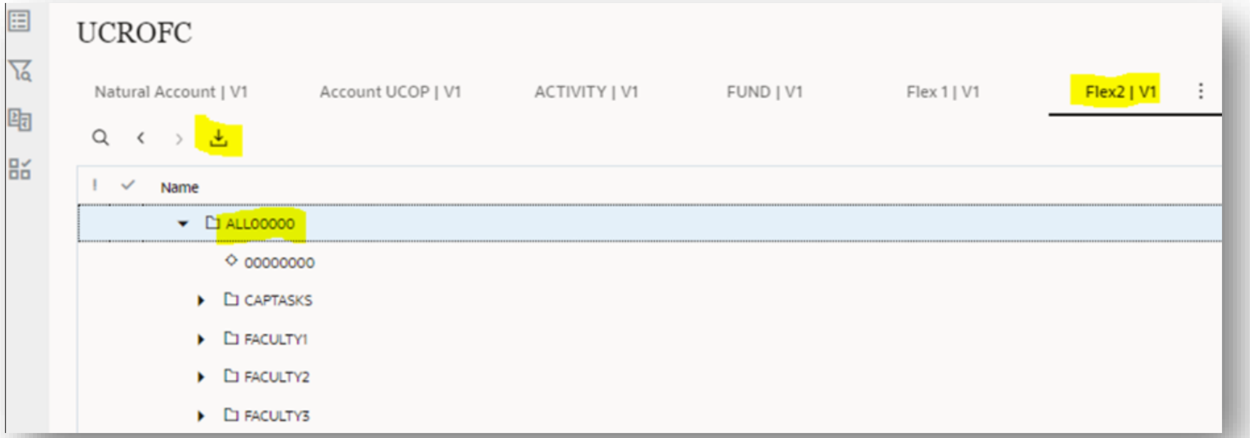
- **ORACLE COA MANAGEMENT**
  1. All the Flex 2 codes that were mistakenly marked as G instead of F have been corrected. As a result, users are advised to review and update their Purchase Orders (POs) and any other instances where the incorrect G codes were used.
  2. Please remember to factor in time for the approval process when requesting changes to the COA hierarchies. Once the requests get to FP&A, we are committed to processing within 3 business days. Updates from OCM are pushed nightly to Oracle GL which in turn updates the COA Golden Tree Viewer.

- **ORACLE COA GOLDEN TREE VIEWER**

  Golden Tree Viewer updates that are currently in the works:
  - Adding "search by description" capabilities
  - Showing the budget only segments (BC75 – BC77)
  - Scheduled updates of Flex2 with UCPath data. The first UCPath file has been received and so Flex 2 will be updated for new Faculty appearing in UCPath by Friday (7/28).

How can I see approved segments?

Quick Reference Guide:
https://drive.google.com/file/d/1ToRMVo0E2vldOjsZIvD7Yd7XxrBIMW7w/view?usp=sharing



1. While in Oracle COA Management, click on Views.
2. Click on UCROFC.
3. Click on the COA segment that you want to view.
4. Click to highlight (for example, ALL00000) to download everything in the file. Alternatively, you can click a lower level and it will download everything below that point (i.e., Clicking on ORG1000000 will download items for ORG10.)
5. Click the Download button.
6. Click the link to the Excel file in the lower left corner of the screen.
7. ***Resulting Excel file has the data that can be searched***.

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PPM Processing Times

- NCE and Amendments received in June were recently manually updated in PPM
- Kuali award notices are being distributed; however, PPM updates are in progress
  - Goal is to resolve backlog over the next two weeks
    - Priority to New Awards
    - Kuali has been successfully integrating to extend PPM dates
  - Team will be working toward a Service Level (SLA) of 2 days
- Reminder:
  - June costs will be converted in early August, so cost data will be incomplete in PPM until the conversion is completed
  - PPM (and Oracle GL) uses "Advisory" controls, meaning transactions resulting in overdrafts will not be prevented. However, PPM does have strict requirements related to project begin and end dates and combination validation rules do require a budget to exist
- Guidance is being developed on requests for additional project codes. Please feel free to provide information on related needs via the ticketing system; this will help inform the guidance.

Upcoming System Deployments

Target	Application Name	Additional Information
Jul	Guest Traveler Routing	Final testing, deployment expected next week.
Aug	Web Recharge	• **Legacy:** Currently working on converting the legacy Web Recharge application to read-only per user requests. • **New:** In August, the Web Recharge application will undergo an additional development and testing cycle.
Aug	Looker	• **Phase 1 Payroll Distribution:** Targeting early August • **Phase 2 Finance (Oracle GL & Budget):** Targeting mid-August
Aug	Financial Web Reports	Pre-run reports: Financial Transaction Details Report, Prime PI Summary Report, and UCR Purchase Order Encumbrance Report
Aug/Sept	Salary Cost Transfer Tool	Planned for late August/early September
Aug/Sept	Non-Salary Cost Transfer Tool	Planned for late August/early September; dependent Looker
Aug	Ledger Reconciliation	Planned for mid-August; involves updating LRSS Matrix for COA
Aug	VCUA Gift Acceptance	Planned for August
Oct	Payroll Certifications	Certifications of payroll under COA

Suppliers and Other Payees

- The Oracle term for vendors and payees is "Supplier"
- As discussed in previous Town Halls and User Group meetings, suppliers will maintain their information using the Supplier Portal
  - This process will ensure personal protected information is appropriately secured
  - Avoids duplicate suppliers
  - Once established, suppliers are available for use for other types of payments, so it is important to obtain required information upon establishment of the supplier
  - Allows PO suppliers to upload insurance and other required certifications
- When campus department users initiate a request, <u>a valid email address associated with the supplier/payee must be provided</u>
- Challenges were initially experienced individuals logging into the supplier portal
  - Enhancements are underway to improve communication
  - A guide has been developed for non-PO Suppliers (i.e., ePay and Concur non-employee payees) to assist payees with completion of the required information (see below).

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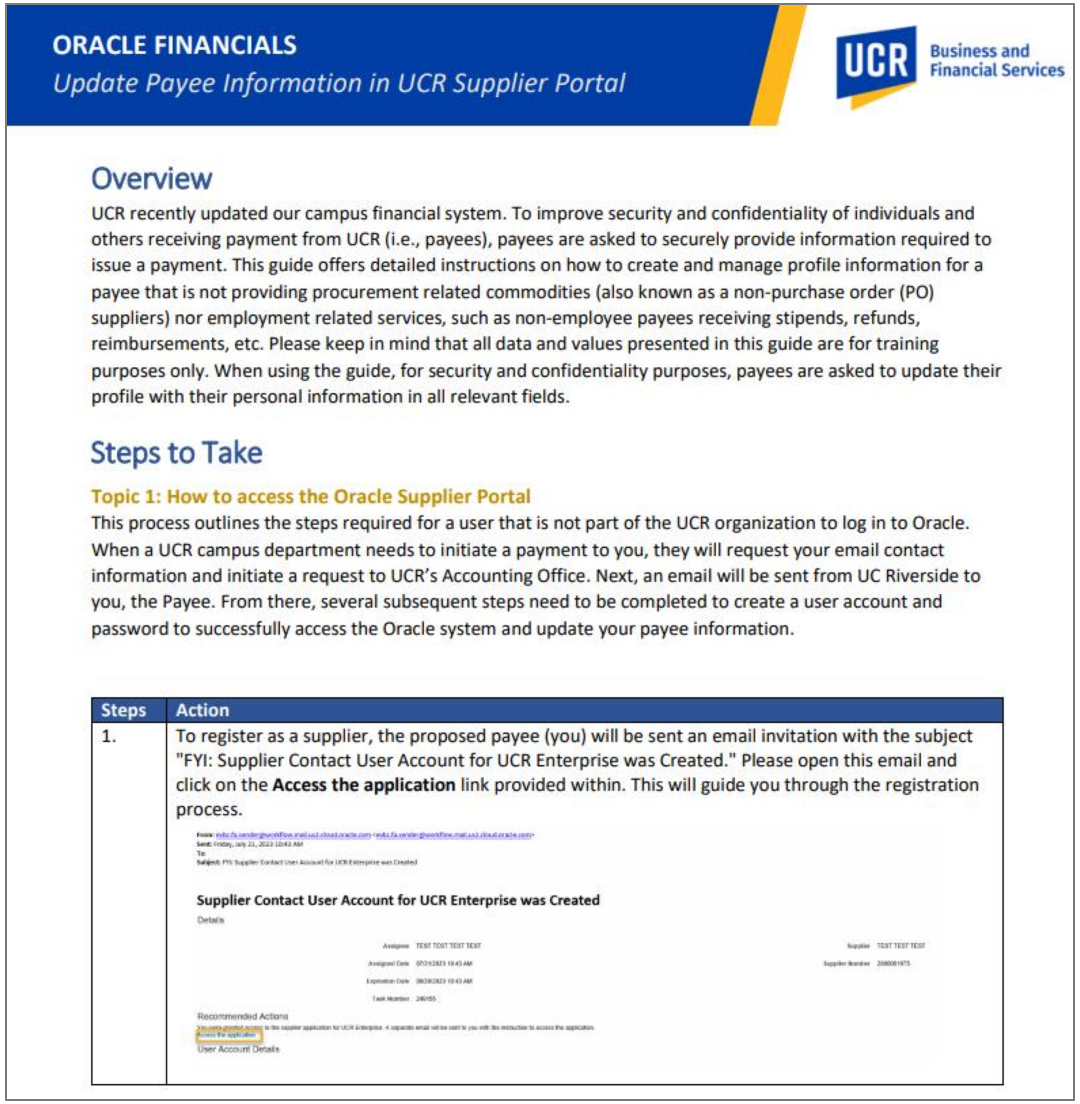
Need to setup a Non-PO Supplier for *Concur and ePay*

The "UCR Supplier Requestor JR" is needed to request a new Oracle Supplier and Payee. Departments are requested to instruct non-PO suppliers/payees to <u>follow this guide</u> carefully and update their profile with their personal information in all relevant fields. Completion of the profile will enable the payee for use in ePay or Concur.

Concur Delegates will be able to assign affiliate (guest traveler) routing for use in Concur next week. In the meantime, we encourage users to take the first step and request a new Oracle Supplier so that it is ready for Concur use once the new system is available.

Creating a Profile in the UCR Supplier Portal:
https://drive.google.com/file/d/1AoFadA2TymLOgMajDaL80abkDAtH-QKY/view?usp=sharing



ORACLE FINANCIALS
Update Payee Information in UCR Supplier Portal

UCR Business and Financial Services

Overview

UCR recently updated our campus financial system. To improve security and confidentiality of individuals and others receiving payment from UCR (i.e., payees), payees are asked to securely provide information required to issue a payment. This guide offers detailed instructions on how to create and manage profile information for a payee that is not providing procurement related commodities (also known as a non-purchase order (PO) suppliers) nor employment related services, such as non-employee payees receiving stipends, refunds, reimbursements, etc. Please keep in mind that all data and values presented in this guide are for training purposes only. When using the guide, for security and confidentiality purposes, payees are asked to update their profile with their personal information in all relevant fields.

Steps to Take

Topic 1: How to access the Oracle Supplier Portal

This process outlines the steps required for a user that is not part of the UCR organization to log in to Oracle. When a UCR campus department needs to initiate a payment to you, they will request your email contact information and initiate a request to UCR's Accounting Office. Next, an email will be sent from UC Riverside to you, the Payee. From there, several subsequent steps need to be completed to create a user account and password to successfully access the Oracle system and update your payee information.

Steps	Action
1.	To register as a supplier, the proposed payee (you) will be sent an email invitation with the subject "FYI: Supplier Contact User Account for UCR Enterprise was Created." Please open this email and click on the **Access the application** link provided within. This will guide you through the registration process. **Supplier Contact User Account for UCR Enterprise was Created** Details Recommended Actions User Account Details

Training Updates & Reminders

Revised Processes

Helen Kotke
Financial Systems Trainer

Chart of Accounts Reminder

Contract & Grants projects – No Flex1 or Flex 2

- Contracts and grants projects (i.e., project values beginning with "K") may not utilize the Flex1 and Flex2 fields.
- The Projects Portfolio Management (PPM) module uses the POETAF values.
- Any boundary system that utilizes the GL chartstring involving a "K" project will automatically interface with PPM using the POETAF.
- To keep all systems synchronized, a GL chartstring using a "K" project value must use the default Flex1 and Flex2 values (i.e., all zeros).

General Ledger - COA Chartstring								
Entity	Fund	Activity	Account	Functn	Program	Project	Flex 1	Flex 2

PPM Subledger - POETAF Chartstring					
Project	Expenditure Org	Expenditure Type	Task	Award	Funding Source

Non Contract & Grant Funds associated with a Faculty member – Use FLEX 2

- Non-contract and grant funds associated with a faculty member's portfolio of resources should be coded using the appropriate Flex2 value in the budget and financial transactions. These actions will enable the generation of non-contract and grant faculty portfolio reports.

Several departments have requested additional K project values to assist with tracking expenditures for contract and grant awards. The Accounting Office will be developing criteria and procedures for these requests in the coming weeks. Stay tuned for further updates and information to be shared soon.

Oracle Budget & Oracle COA Management

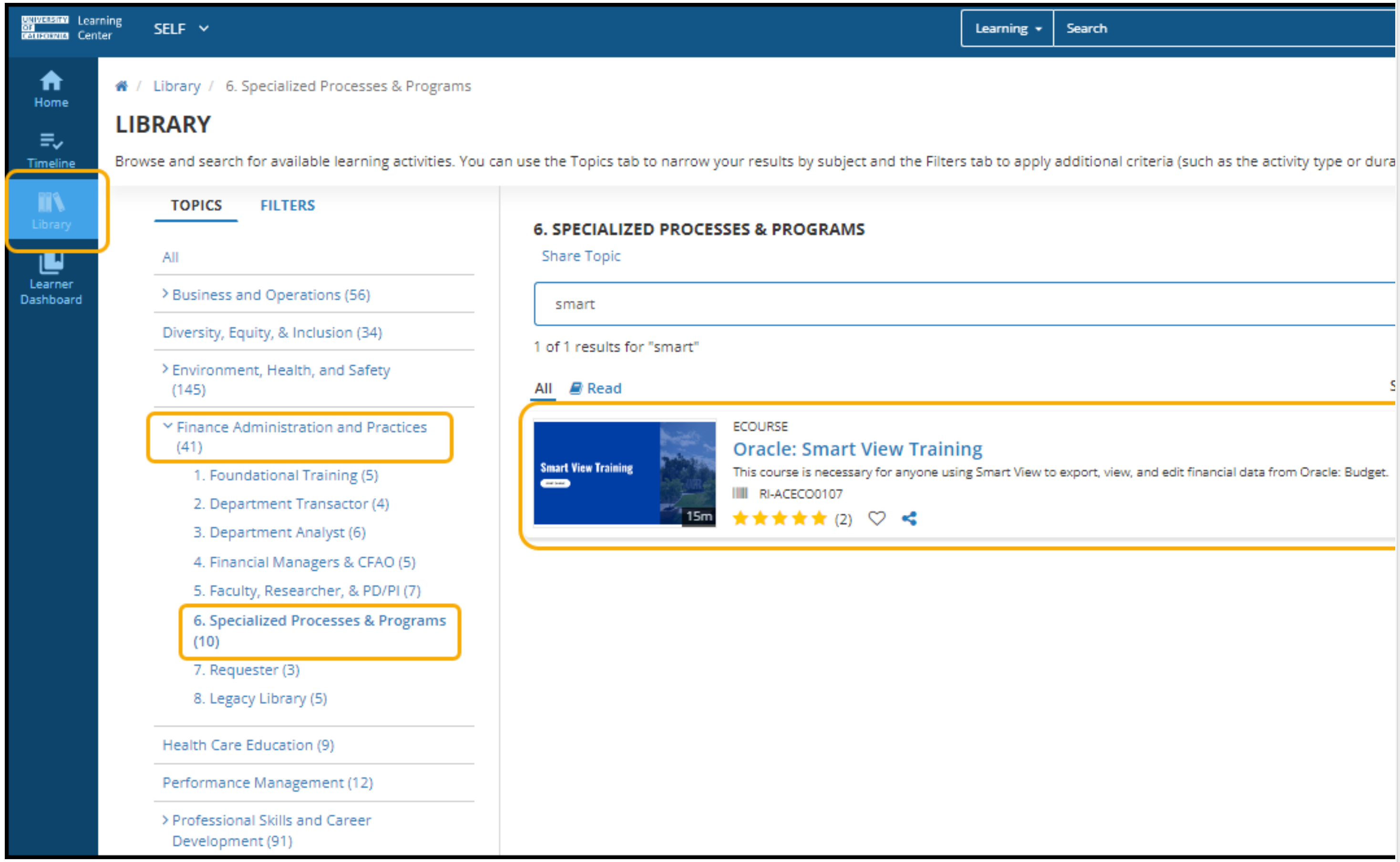
- Most budgets were loaded into Oracle without using Flex fields. Therefore, when viewing the budget in Oracle, defaulting to the NO FLEX option is recommended unless any budgets have explicitly moved.

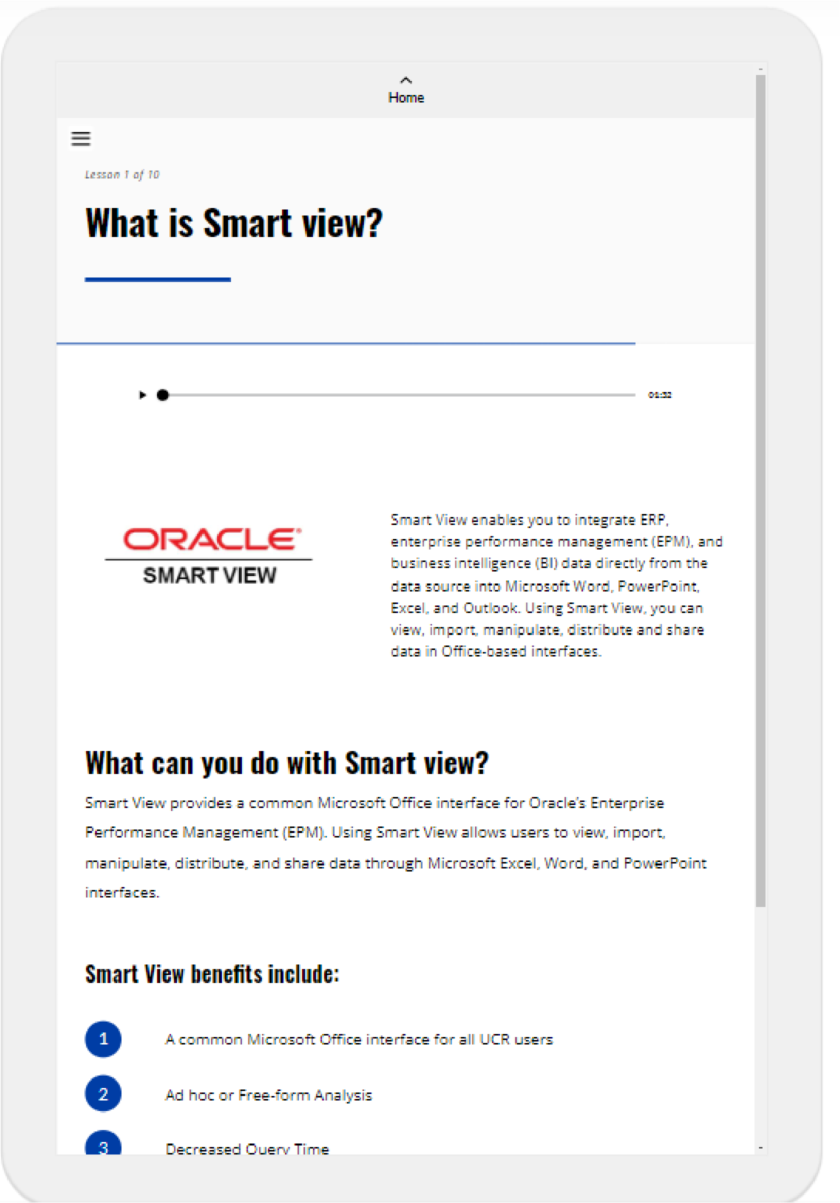
- To request new Flex2 values, the Org CFAO should submit the request to stephm@ucr.edu.
  Please ensure the request includes the following:

  - First and Last Name
  - NetID
  - Employee ID
  - The non-C&G fund sources that require tracking with the Flex2 value

SmartView Training

Introducing the SmartView Training for Oracle Budget!





Oracle COA Management Update

- **The new Chart of Accounts (COA) management tool, Oracle COA Management has launched and is available as an App in R'Space!**
- To initiate a request, please consult your CFAO for guidance on the process for your Org and they can provide a step-by-step guide, if necessary.
- Prior to submitting a request, it is important to familiarize yourself with the guidelines for COA values and descriptions found in the Chart of Accounts Overview training.
- Turn on Oracle Guided Learning for guidance: How to Install Oracle Guided Learning Extension Manually
- Attend Office Hours
- The new Oracle COA Golden Tree Viewer is in R'Space under Tools. Changes initiated and approved in the Oracle COA Management production environment will be visible in the new Golden Tree Viewer on 7/5.

Training & Tools

Access & Training

- UC Learning Center (LMS)
- UCR Enterprise Directory
- Enterprise Access Control System
- Enterprise Systems Access Instructions
- EACS Accountability Report

Tools

- ITS Website and Service Center
- UCPath Portal
- UC Retirement At Your Service
- Fidelity NetBenefits
- UCnet
- DocuSign
- UCPath Project Updates
- Manage MyAccount
- R'Projects: Project Intake
- Zimride
- UC Policies and Procedures
- UCR Policies and Procedures
- Delegations of Authority
- FMS (Facilities Management System)
- UCPath ServiceLink Forms
- TechAlerts
- One-Time Payment Tool
- Encumbrance Tools & Tips
- iTravel Web Support
- Reporting Systems @ UCR
- Oracle COA Golden Tree Viewer
- UCRFS Golden Tree Viewer
- UCRFS Legacy Reports Website
- Expiring Funds Notification System
- UCR HRMS Job Code Information
- Course Catalog Search
- Adoptions & Insights
- Web Recharge Rates
- Workfront
- Workplace Health and Wellness

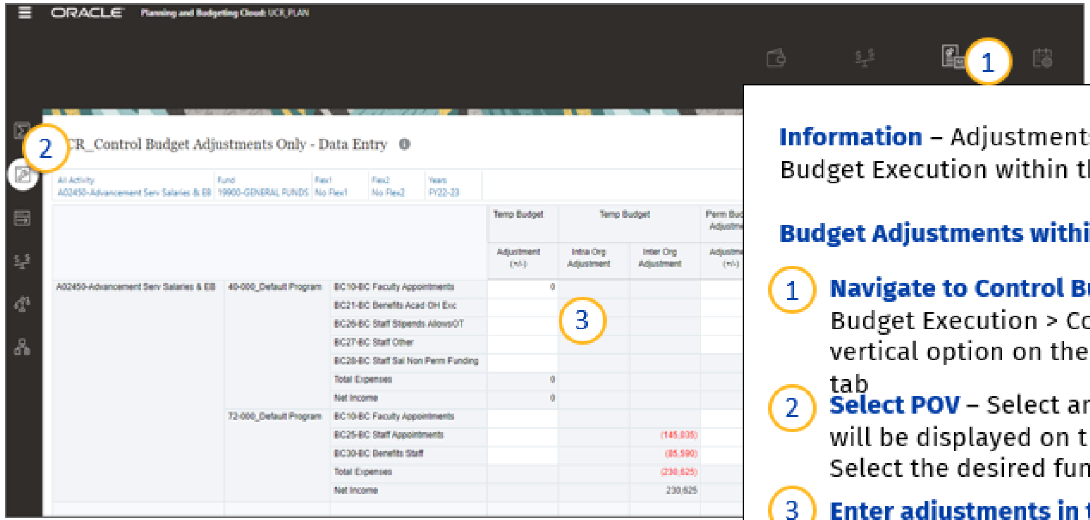
COA Validation Process – Temp Adjustments

The COA validation process involves a check to ensure that the COA elements (entity, fund, activity, function, program, project) are linked via a valid budget entry.

Permanent budgets as of 5/31 converted to Oracle Budget, but the carry forward balances associated with COA combinations in permanently budgeted funds were not.

If a COA combination does not exist AND it is anticipated that there will be carry forward funding into FY24, the current workaround is to do a Temp Adjustment moving $1 from BC75 to another BC to process transactions (similar to a Zero$ BEA).

Note this workaround should only be performed if the COA combination is valid and a carryforward budget is reasonably expected. Final 6/30 Perm Budgets will be loaded by 7/24, and Final Rollover (CFD) Balances will be loaded in early August.



Information – Adjustments to perm/temp budget are done in Budget Execution within the unit or InterORG.

Budget Adjustments within the same ORG:

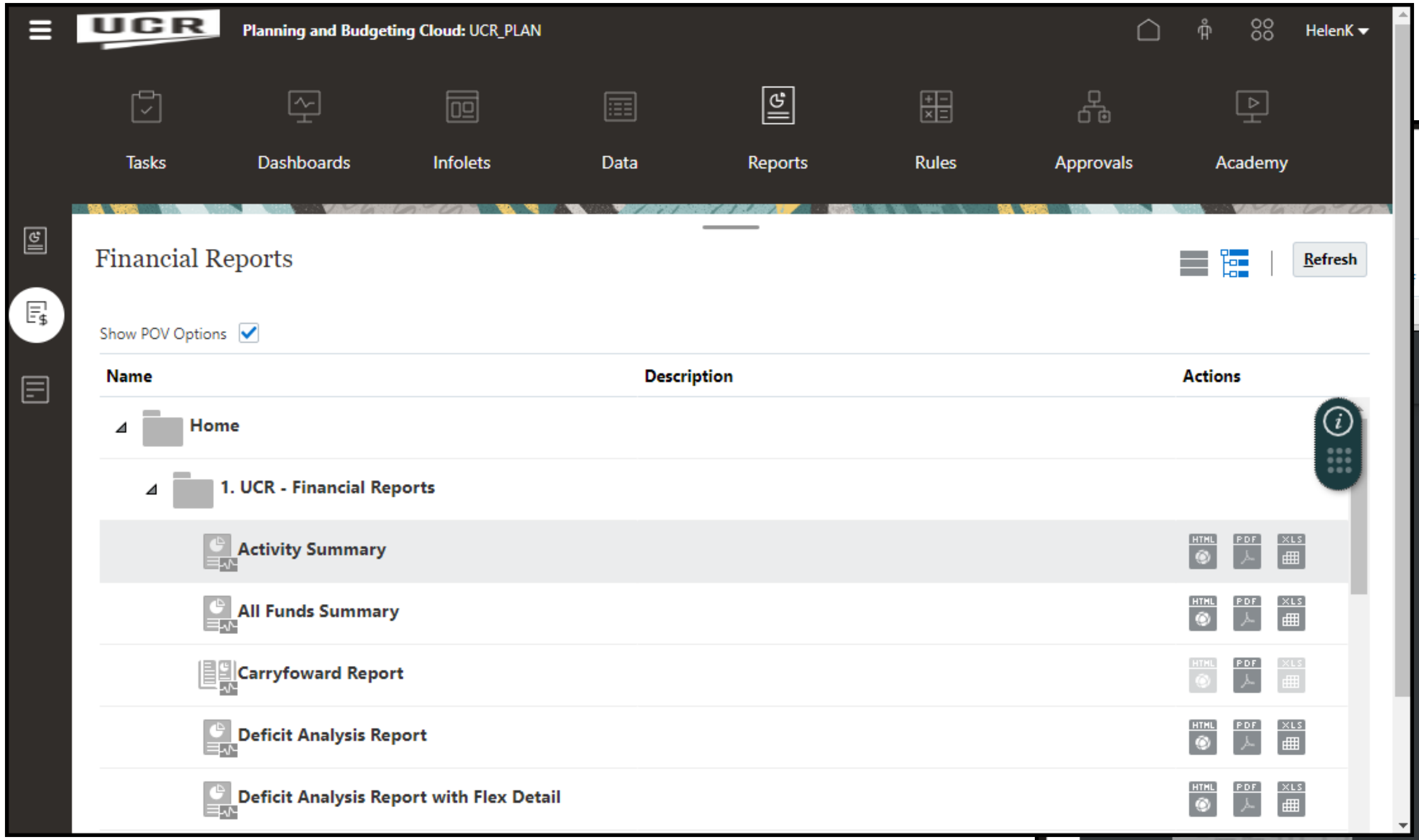
1. **Navigate to Control Budget Adj.** – Navigate to Financials > Budget Execution > Control Budget and Rollover (2nd vertical option on the left) > Control Budget Adjustment tab
2. **Select POV** – Select an ORG. All activities within the ORG will be displayed on the rows
   Select the desired fund and flex members
3. **Enter adjustments in the Form** – Make the required adjustments in the Perm/Temp Budget Adjustment Columns.

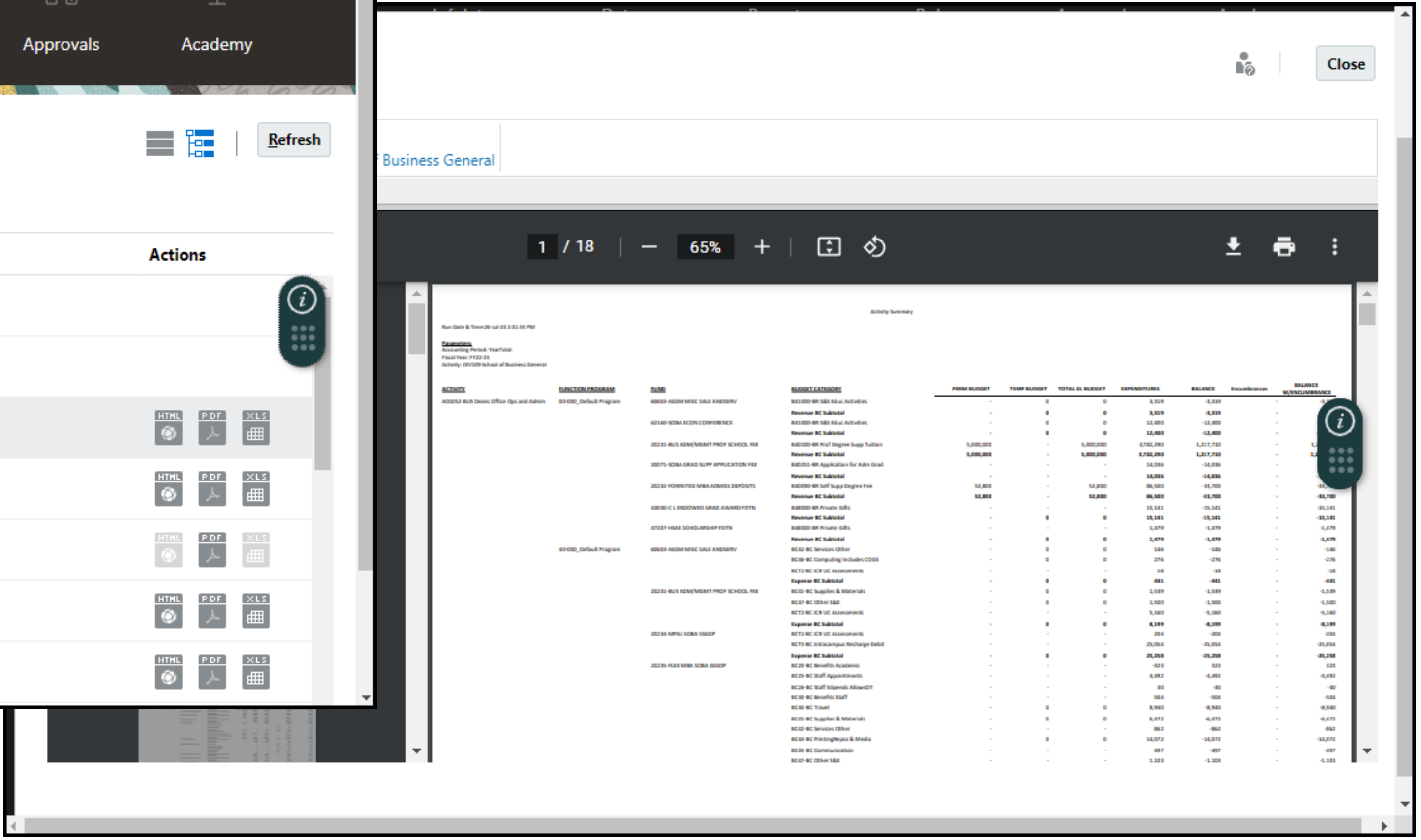
   Adjustments that do not net to zero will trigger an error message to pop up

Correct Function

The conversion of budget data included a function clean-up. The administrative functions in Colleges/Schools used to be function 40, but it should be function 43, for example.

Please run the Activity Summary report in Oracle Budget to see the correct function to use for your transactions.





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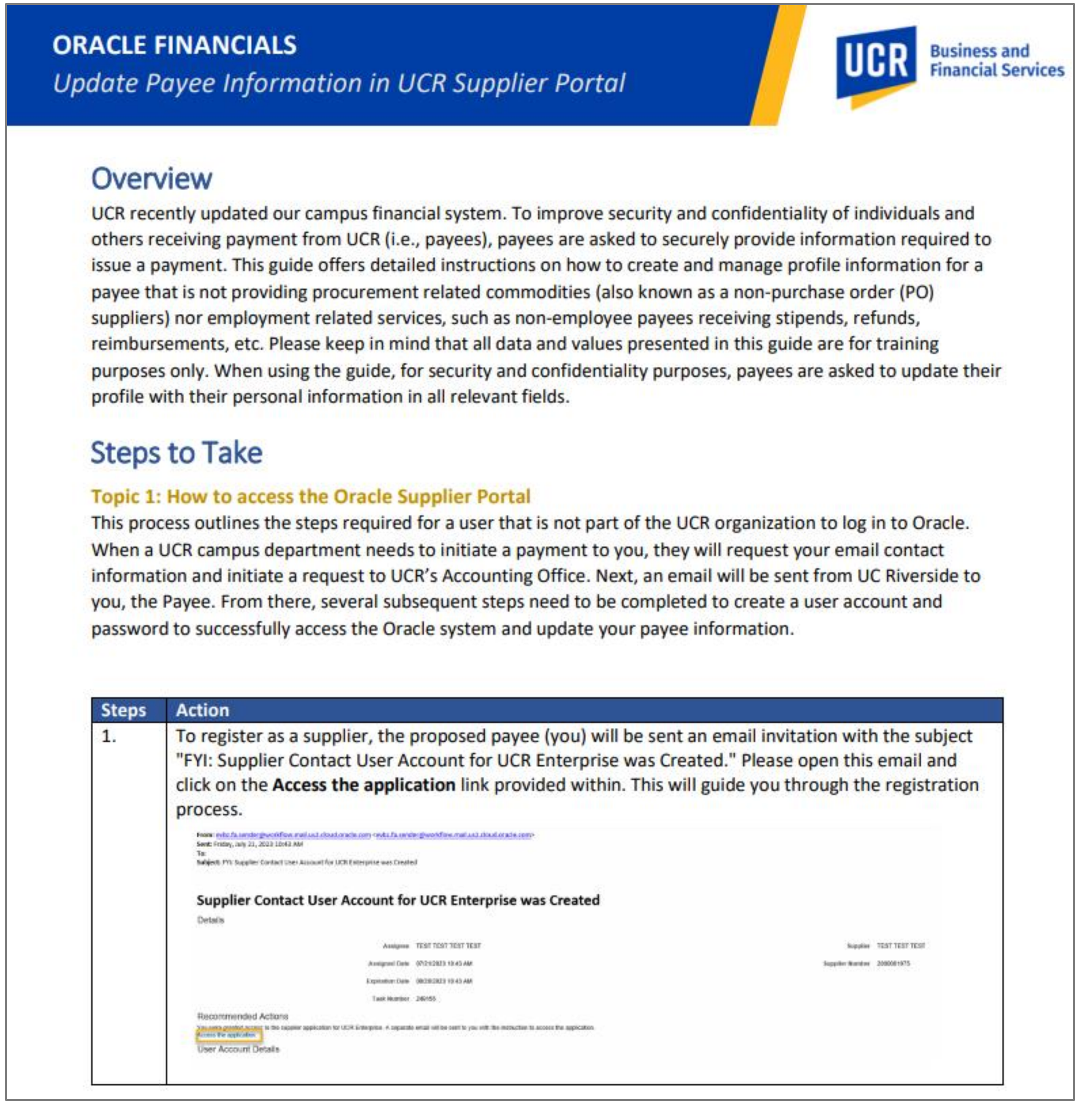

ORACLE FINANCIALS

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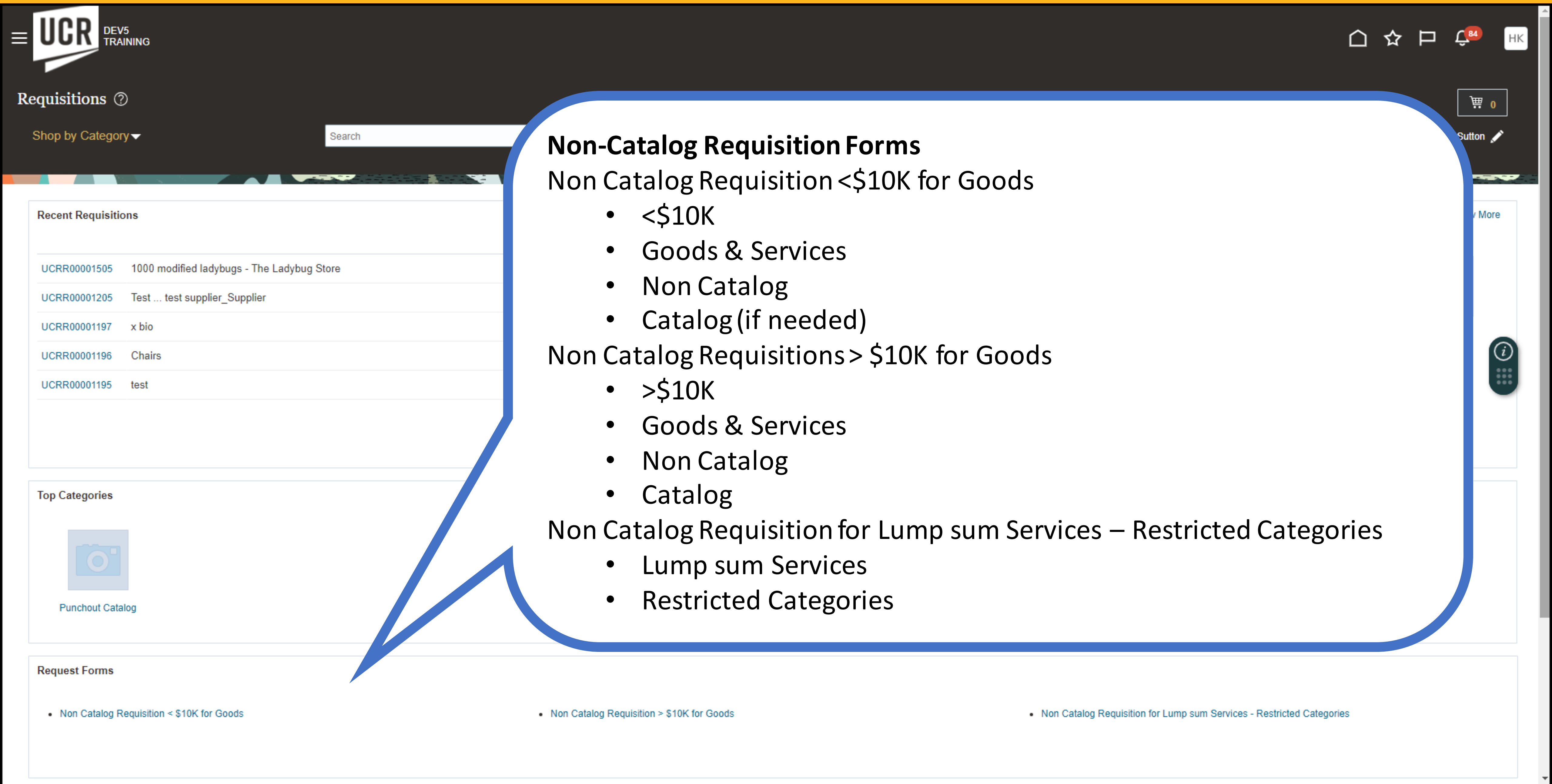
Non-Catalog Requisition Forms



Non-Catalog Requisition Forms

Non Catalog Requisition <$10K for Goods

- <$10K
- Goods & Services
- Non Catalog
- Catalog (if needed)

Non Catalog Requisitions > $10K for Goods

- >$10K
- Goods & Services
- Non Catalog
- Catalog

Non Catalog Requisition for Lump sum Services – Restricted Categories

- Lump sum Services
- Restricted Categories

Freight (Shipping & Handling)

Freight as well as shipping and handling line should be added as a line item with category as ‘Freight[543100]. On PO, freight and shipping/ handling line will be always non-taxable. If freight or shipping handling line is taxable then taxability nature will be taken care at Invoice level by AP team. So, procurement doesn’t need to worry about taxability.

If freight or shipping charges are below $500 then please update invoice and receiving close tolerance as 100% so that line will be closed on PO. Because on such PO’s, AP will not match invoice with PO freight or shipping line item.

Whereas, **if freight or shipping charges are above $500 then please don’t update invoice and receiving close tolerance.** Because in such cases, AP will match invoice with PO freight or shipping line item.

PCard Questions

Create Requisition using a PCard Check out the OGL guide on this topic. It is also included in the Buying and Paying Workshop with a case study on this specific process. To view the step-by-step PDF guide for Create Requisition using PCard, please visit here. Please note this process is optional to assist units with tracking requests fulfilled with the PCard.

Need a PCard? Take the new and improved Procurement Card (PCard) Training under the Specialized Processes and Programs learning path! It includes requesting a PCard, using the PCard, Expense Report processing, and more! Important reminders regarding PCard usage:

- **PCard EACS Setup:** To ensure card transactions are associated with the correct profile in Concur, PCard Holders must be set up in EACS.

- **Timing of Card Charges:** Card charges typically appear in Concur within 3-5 days after the purchase is made.

- **PCard Expense Reports:** It is essential to submit the PCard Expense Report to your Financial Approver by the 28th of the month (allowing three days after the 25th statement closing for transactions to post and for you to distribute within the same period) and ensure approval before the last day of each month. Access this detailed step-by-step guide for completing the monthly PCard Expense Reports.

What about PCTs? …. Expense Report Processing

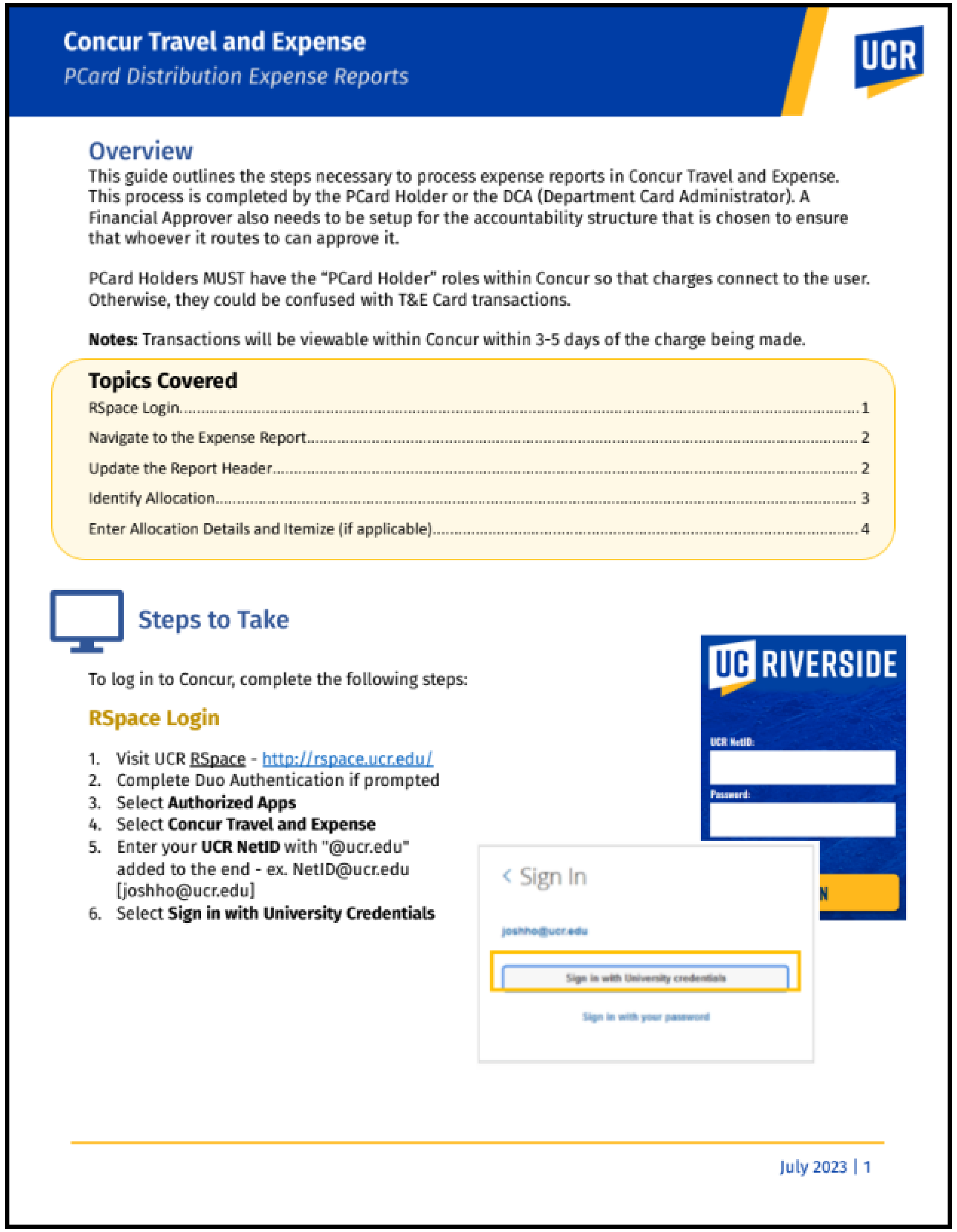
General Process:

- Navigate to the Expense Report
- Update the Report Header
  DO NOT CHANGE THE REPORT NAME
- Identify allocation(s)
- Enter details and itemize (if applicable) for each expense

Once the statement is closed:

- Generally 26 the of each month
- Once all transactions have been classified and reconciled, then click Submit Report to submit the expense report to the designated approver
- Must be done before the accounting period closes

Quick Reference Guide



Concur Travel and Expense
PCard Distribution Expense Reports

UCR

Overview

This guide outlines the steps necessary to process expense reports in Concur Travel and Expense. This process is completed by the PCard Holder or the DCA (Department Card Administrator). A Financial Approver also needs to be setup for the accountability structure that is chosen to ensure that whoever it routes to can approve it.

PCard Holders MUST have the "PCard Holder" roles within Concur so that charges connect to the user. Otherwise, they could be confused with T&E Card transactions.

Notes: Transactions will be viewable within Concur within 3-5 days of the charge being made.

Topics Covered

Steps to Take

To log in to Concur, complete the following steps:

RSpace Login

1. Visit UCR RSpace - http://rspace.ucr.edu/
2. Complete Duo Authentication if prompted
3. Select **Authorized Apps**
4. Select **Concur Travel and Expense**
5. Enter your **UCR NetID** with "@ucr.edu" added to the end - ex. NetID@ucr.edu [joshho@ucr.edu]
6. Select **Sign in with University Credentials**

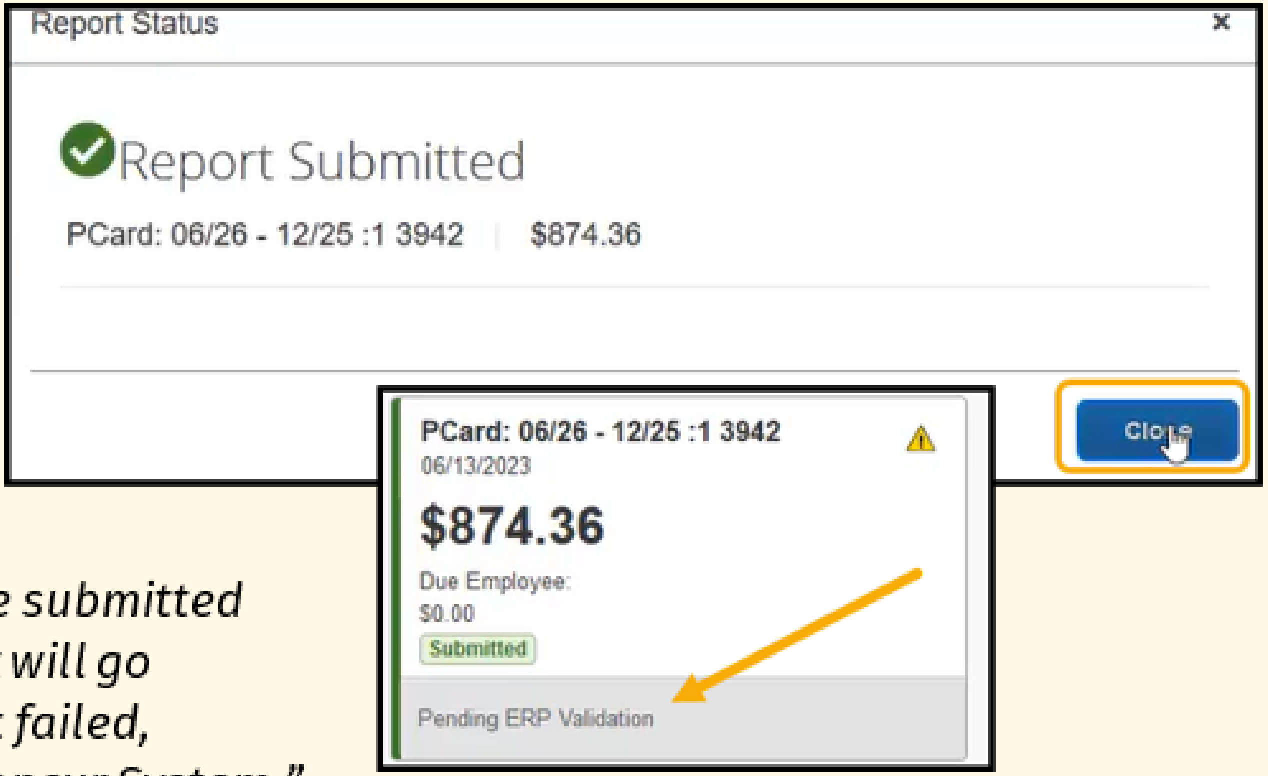
UC RIVERSIDE
UCR NetID:
Password:
< Sign In
joshho@ucr.edu
Sign in with University credentials
Sign in with your password

Concur COA Validation

After the report is submitted, a pop-up will appear confirming the status.

In the box on the "Manage Expenses" screen a banner will appear at the bottom which reads "Pending ERP Validation."

This indicates that they system has not yet checked to confirm that the COA values that were entered are correct.



This process runs every 20 minutes. Once the submitted report has passed this validation, the report will go to the approver for review and approval. If it failed, it will remain stating "Sent Back to User – Concur System." This is process happens for both requests and expense reports.

ePAY – What's Remaining in the Online Payment System

RETIRING FROM EPAY

MOVING TO CONCUR

SINGLE PAYEE/VENDOR, SINGLE PAYMENT

- Membership (reimbursement)
- Petty Cash
- Reimbursement
- Refunds
- RHA (Housing Use Only)

BUSINESS MEETINGS, ENTERTAINMENT & OTHER OCCASIONS

- All Categories

ePay – Online Payment System

REMAINING IN EPAY

SINGLE PAYEE/VENDOR, SINGLE PAYMENT

- Honoraria to Non-UC Employee or Non-UCR Student
- Human Subject Payment
- Performance Agreement
- Stipend to Non-Student
- Casual Labor
- Game Official
- Homestay
- Library Acquisitions (ORG16 access only)
- Other

MULTI-PAYEE/SUPPLIER, MULTI-PAYMENTS

- Honoraria to Non-UC Employee or Non-UCR Student
- Human Subject Payment
- Refunds
- Stipend to Non-Student
- Casual Labor
- Game Official
- Homestay

EACS: Department SAA Provisioning Request

Department SAAs play an important role in provisioning access to our campus users. Various requests have been distributed to Department SAAs regarding important role provisioning related to the new systems to enable the appropriate workflow of transactions and system integration, such as the need to immediately provision: Concur Phase II roles, specifically PCard Holder and Financial Approver, to enable the US Bank interface of PCard transactions. Click for guidance.

All roles involved in the procurement workflow, such as Procurement Financial Approver, Payables Financial Approver and Receiving roles for every Accountability Structure containing a Procurement Transactor. Without these roles, the routing will fail and the transactions cannot proceed.

Oracle Financials Training Roles: Please note that participants cannot join training workshops without appropriate roles assigned by the Dept. SAA in Oracle Financials Training, which is separate from production (Oracle Financials). Click to view roles.

To obtain access to a new system, users are required to collaborate with their Department SAA (System Access Administrator).

To locate your Department SAA in R'Space, please follow these steps:

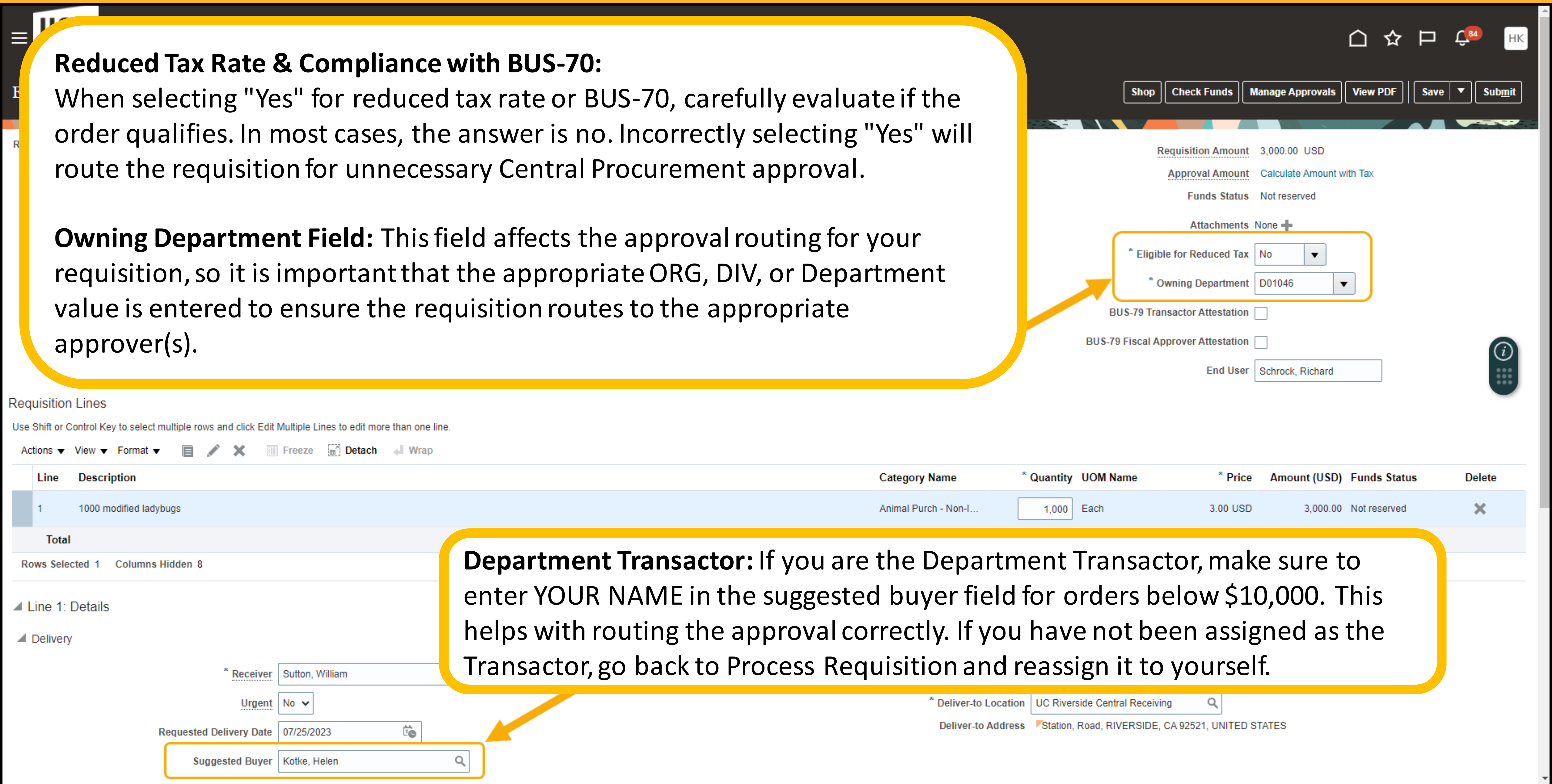
- Click on EACS Accountability Report
- Select Click here for SAA Names
- Search for your SAA by Org Value

Requisition Reminders *(These Impact Approval Routing)*

Reduced Tax Rate & Compliance with BUS-70:
When selecting "Yes" for reduced tax rate or BUS-70, carefully evaluate if the order qualifies. In most cases, the answer is no. Incorrectly selecting "Yes" will route the requisition for unnecessary Central Procurement approval.

Owning Department Field: This field affects the approval routing for your requisition, so it is important that the appropriate ORG, DIV, or Department value is entered to ensure the requisition routes to the appropriate approver(s).

Department Transactor: If you are the Department Transactor, make sure to enter YOUR NAME in the suggested buyer field for orders below $10,000. This helps with routing the approval correctly. If you have not been assigned as the Transactor, go back to Process Requisition and reassign it to yourself.



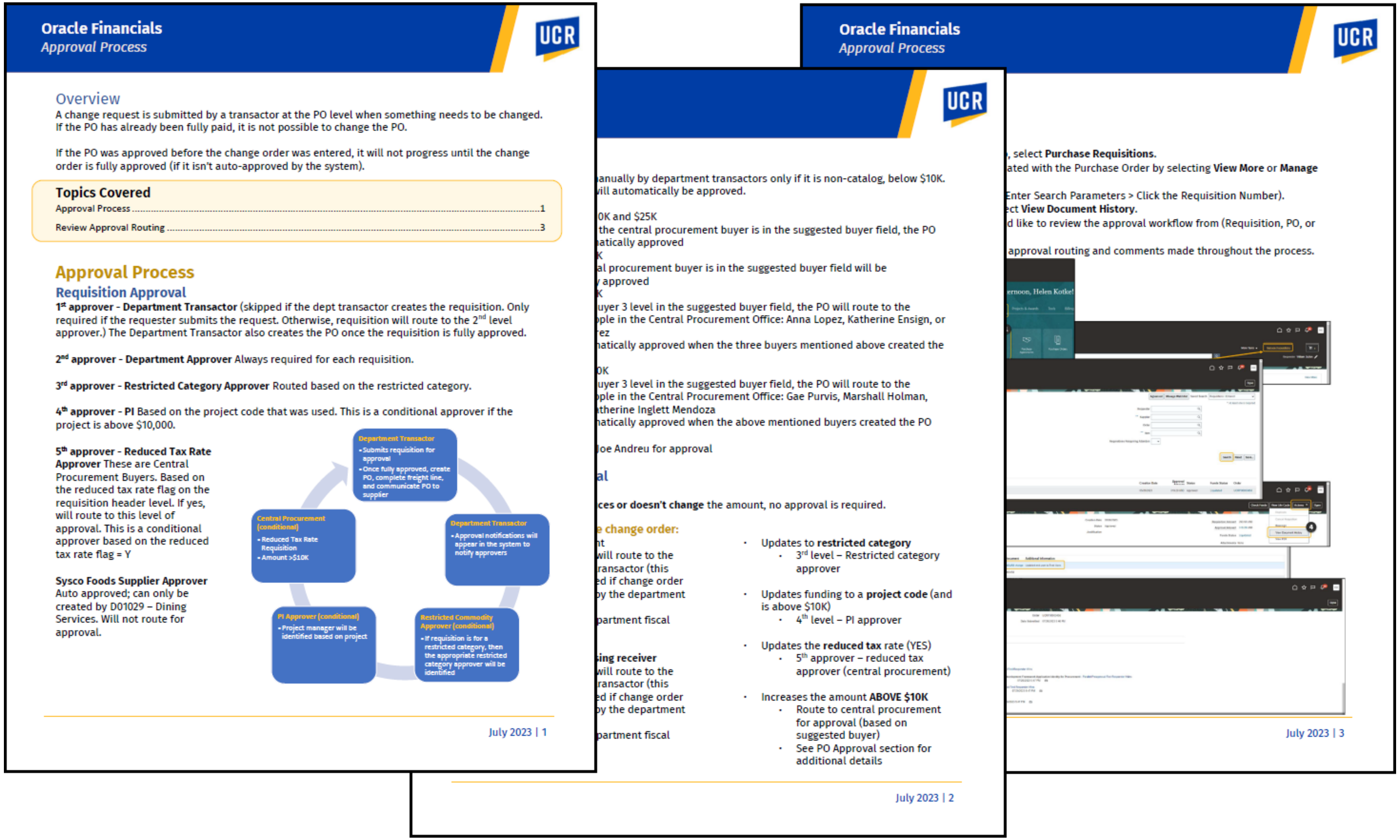
Approval Process & Review

Approval Process:

- Requisition approver levels
- PO Approval
- Change Order Approval

Review Approval Routing:

- Navigate through the requisition
- From the Actions menu, select “View Document History”
- Select the step you would like to view
- Review the routing and comments



Oracle Financials
Approval Process

Overview

A change request is submitted by a transactor at the PO level when something needs to be changed. If the PO has already been fully paid, it is not possible to change the PO.

If the PO was approved before the change order was entered, it will not progress until the change order is fully approved (if it isn't auto-approved by the system).

Topics Covered

Approval Process

Requisition Approval

1st approver - Department Transactor (skipped if the dept transactor creates the requisition. Only required if the requester submits the request. Otherwise, requisition will route to the 2nd level approver.) The Department Transactor also creates the PO once the requisition is fully approved.

2nd approver - Department Approver Always required for each requisition.

3rd approver - Restricted Category Approver Routed based on the restricted category.

4th approver - PI Based on the project code that was used. This is a conditional approver if the project is above $10,000.

5th approver - Reduced Tax Rate Approver These are Central Procurement Buyers. Based on the reduced tax rate flag on the requisition header level. If yes, will route to this level of approval. This is a conditional approver based on the reduced tax rate flag = Y

Sysco Foods Supplier Approver Auto approved; can only be created by D01029 – Dining Services. Will not route for approval.

Manually by department transactors only if it is non-catalog, below $10K. will automatically be approved.

0K and $25K

the central procurement buyer is in the suggested buyer field, the PO atically approved

al procurement buyer is in the suggested buyer field will be approved

uyer 3 level in the suggested buyer field, the PO will route to the ple in the Central Procurement Office: Anna Lopez, Katherine Ensign, or ez

atically approved when the three buyers mentioned above created the

0K

uyer 3 level in the suggested buyer field, the PO will route to the ple in the Central Procurement Office: Gae Purvis, Marshall Holman, therine Inglett Mendoza

atically approved when the above mentioned buyers created the PO

oe Andreu for approval

ces or doesn't change the amount, no approval is required.

e change order:

- Updates to restricted category
  - 3rd level – Restricted category approver
- Updates funding to a project code (and is above $10K)
  - 4th level – PI approver
- Updates the reduced tax rate (YES)
  - 5th approver – reduced tax approver (central procurement)
- Increases the amount ABOVE $10K
  - Route to central procurement for approval (based on suggested buyer)
  - See PO Approval section for additional details

Oracle Financials
Approval Process

, select **Purchase Requisitions**.
ated with the Purchase Order by selecting **View More** or **Manage**

Enter Search Parameters > Click the Requisition Number).
ct **View Document History**.
d like to review the approval workflow from (Requisition, PO, or

approval routing and comments made throughout the process.

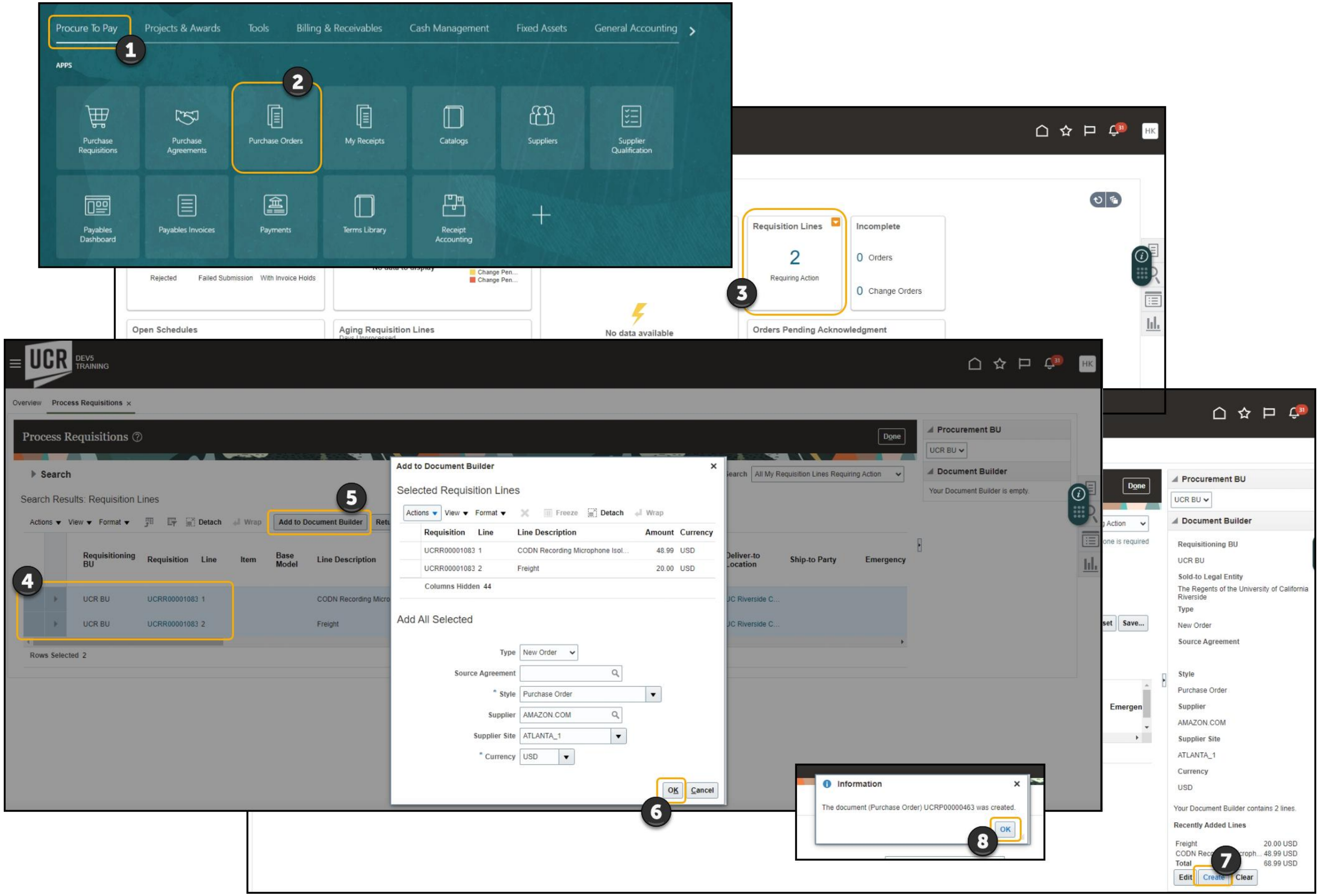
Quick Reference Guide

PO Creation – Transactor Reminder

For transactors, when a requisition has completed the approval routing, it will return to the transactor for action!

Create a Purchase Order

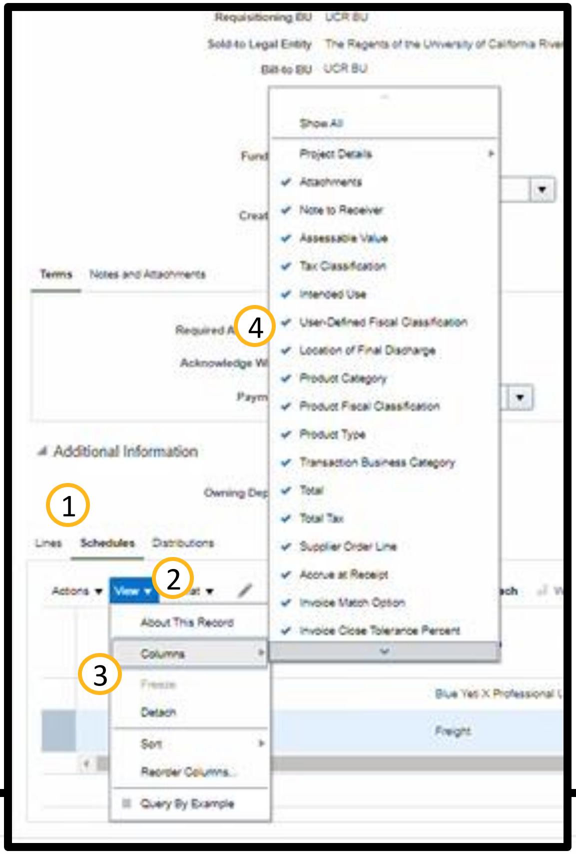
1. Procure to Pay
2. Purchase Orders
3. Select the Requisition Lines Requiring Actions
4. Select all rows associated with the specific requisition number
5. Add to document builder
6. Click OK
7. Click Create
8. A confirmation pop-up will appear. Click OK

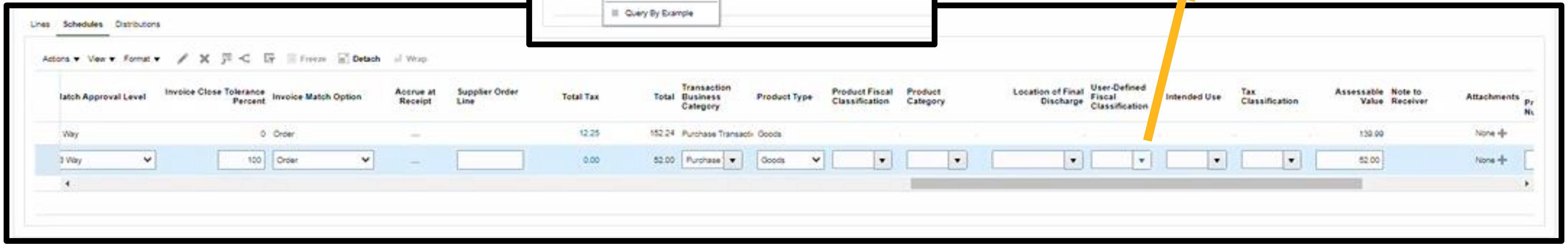


PO Creation – What if a row is Non-Taxable?

Update a PO Row to Non-Taxable

1. In the PO, select the Schedules tab
2. View
3. Columns
4. Add "User Defined Fiscal Classification field“
5. change that field to "Override to Non-Taxable“ and click Save



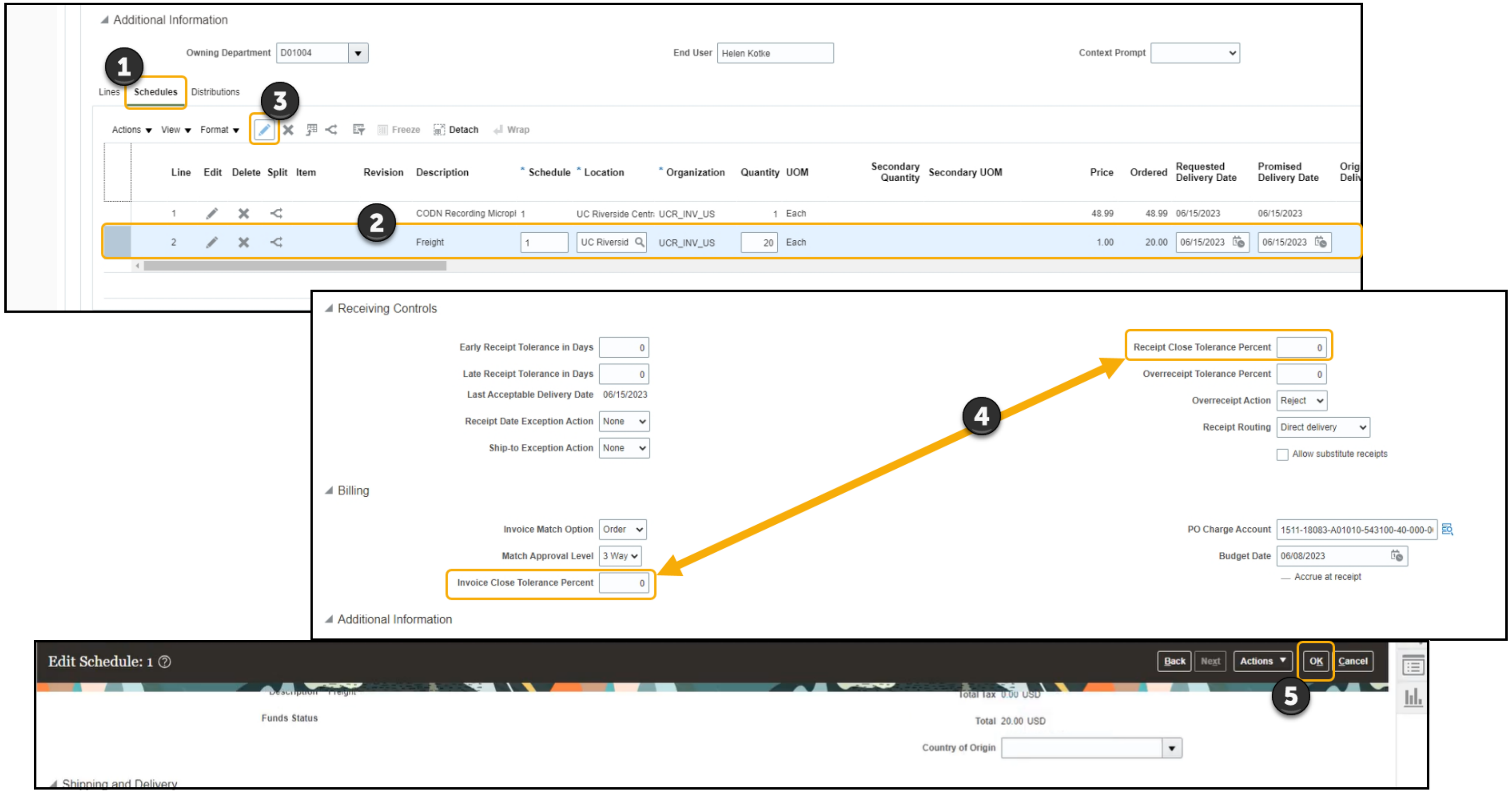


Freight Line, and only the Freight Line!

If there is a freight line, bring the Receipt Close Tolerance Percent and the Invoice Close Tolerance Percent to 100.

Complete Freight

1. In the Additional Information section, select Schedules
2. Select the **Freight** line
3. Click the **Pencil** icon to edit
4. Update **Receipt Close Tolerance Percent** and the **Invoice Close Tolerance Percent** to 100
5. Once done, click **OK**

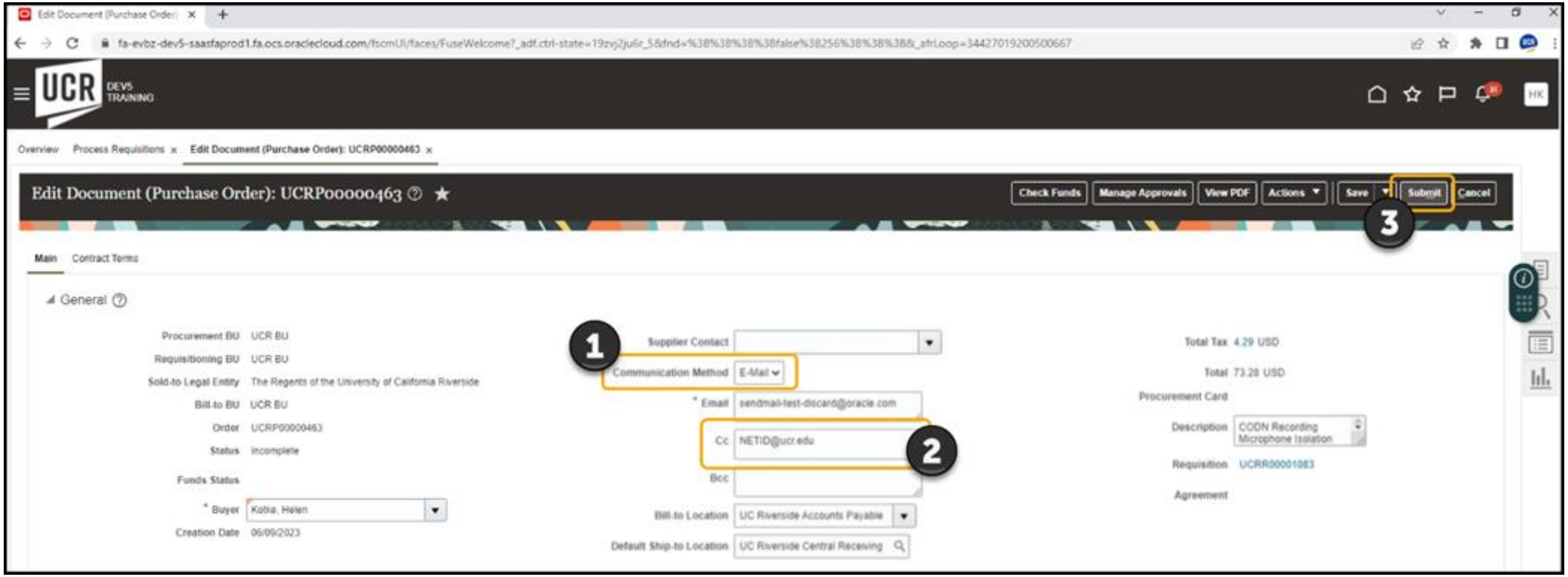


Caution! ONLY complete the freight line (if there is one). Closing all the rows will close the PO.

Communicate PO – Transactor Reminder

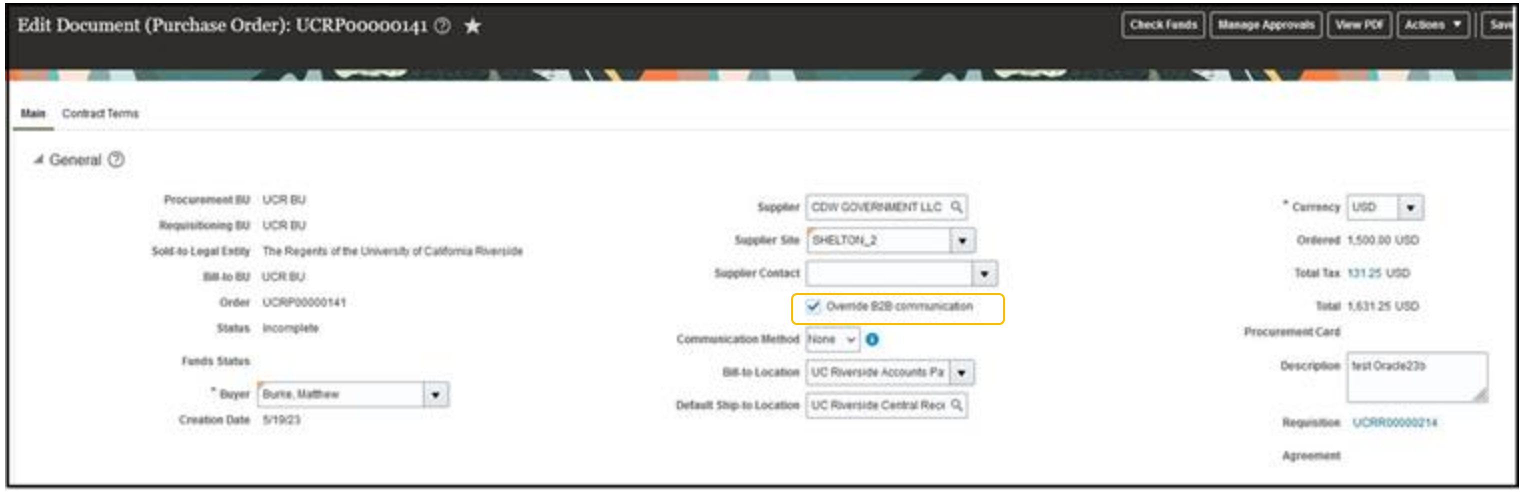
When issuing a PO:

1. Select **Email** from the **Communication Method** dropdown
2. Enter your email into the **Bcc box** to receive a copy of the email
3. Click **Submit**



If the selected supplier is a ***Punchout Supplier***, additional considerations and steps are needed to ensure that the PO is processed/communicated correctly.

B2B Communication – Transactor Reminder



Documentation Only
Is it a PCard Transaction for documentation only?

- Click the checkbox
- Select **None** for the "Communication Method"

PO Needs to be Filled
Is it a non-catalog transaction for a punchout supplier that needs to be filled?

- Click the checkbox
- Select **Email** for the "Communication Method"
- Enter the Supplier's email address

Punchout Suppliers

The "Override B2B communication" checkbox will appear if this is a **non-catalog requisition** for a punchout supplier.

These steps are critical because if incorrectly processed, a transaction could get **communicated to the supplier for fulfillment that is meant to be documentation-only** OR a **transaction that does need to go to the supplier won't be communicated**.

PO Questions!?

Auto-Rejection

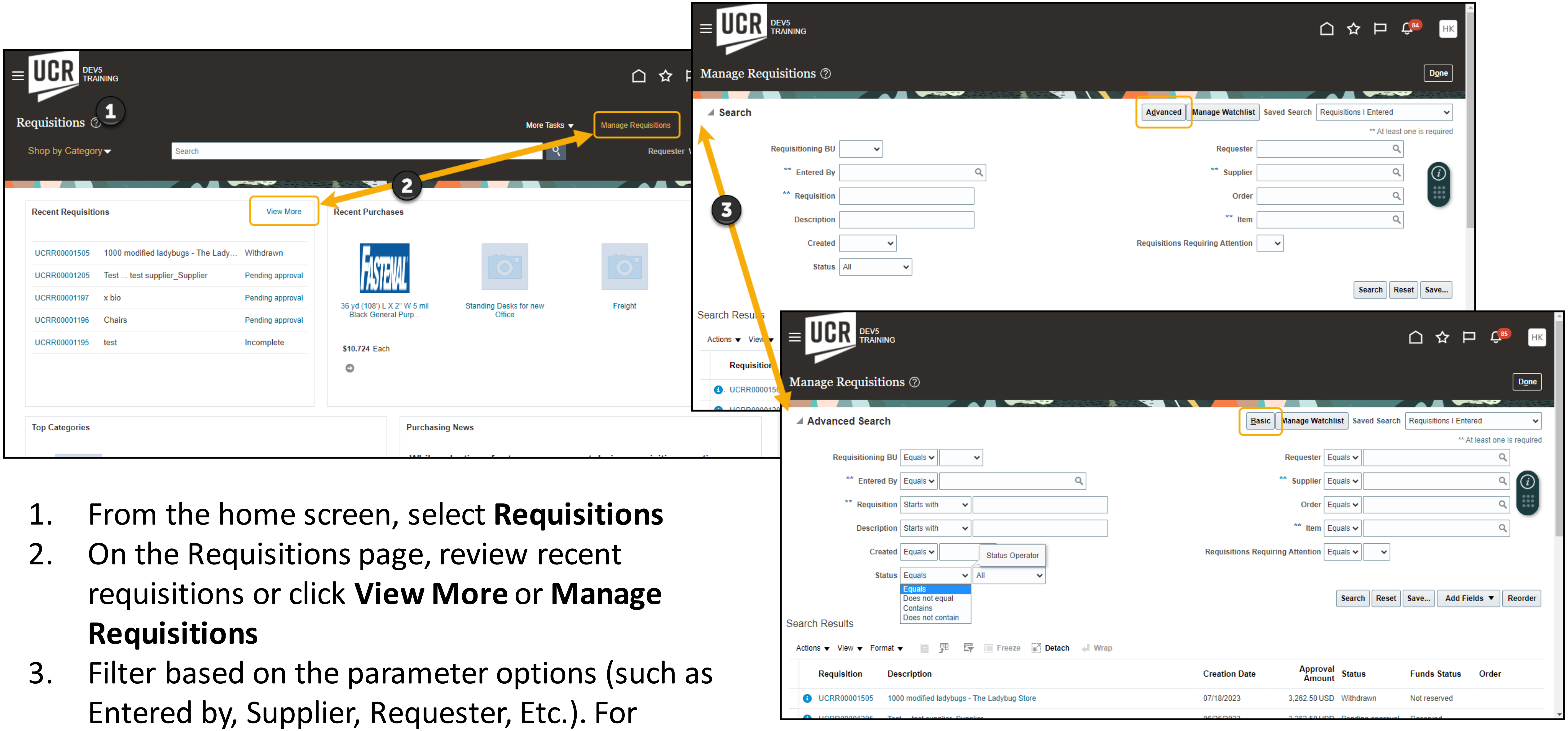
- Purchases entered in punchout catalogs that are greater than $10,000 (except for certain restricted catalogs Sysco, Amerisource Bergen, ePlus, and McKesson)
- If no approver was set up through EACS, then the requisition will auto-reject

Purchase Order (PO) Conversion Reminder

Specific base criteria were used to determine conversion eligibility for each PO type. However, due to variances in data structures between eBuy and Oracle, it is possible that certain POs meeting the criteria may not have successfully converted. Read Purchase Order Conversion for Oracle Procurement for guidance and next steps.

If your PO did not convert – create a new requisition!

How do I find? …. A Requisition?

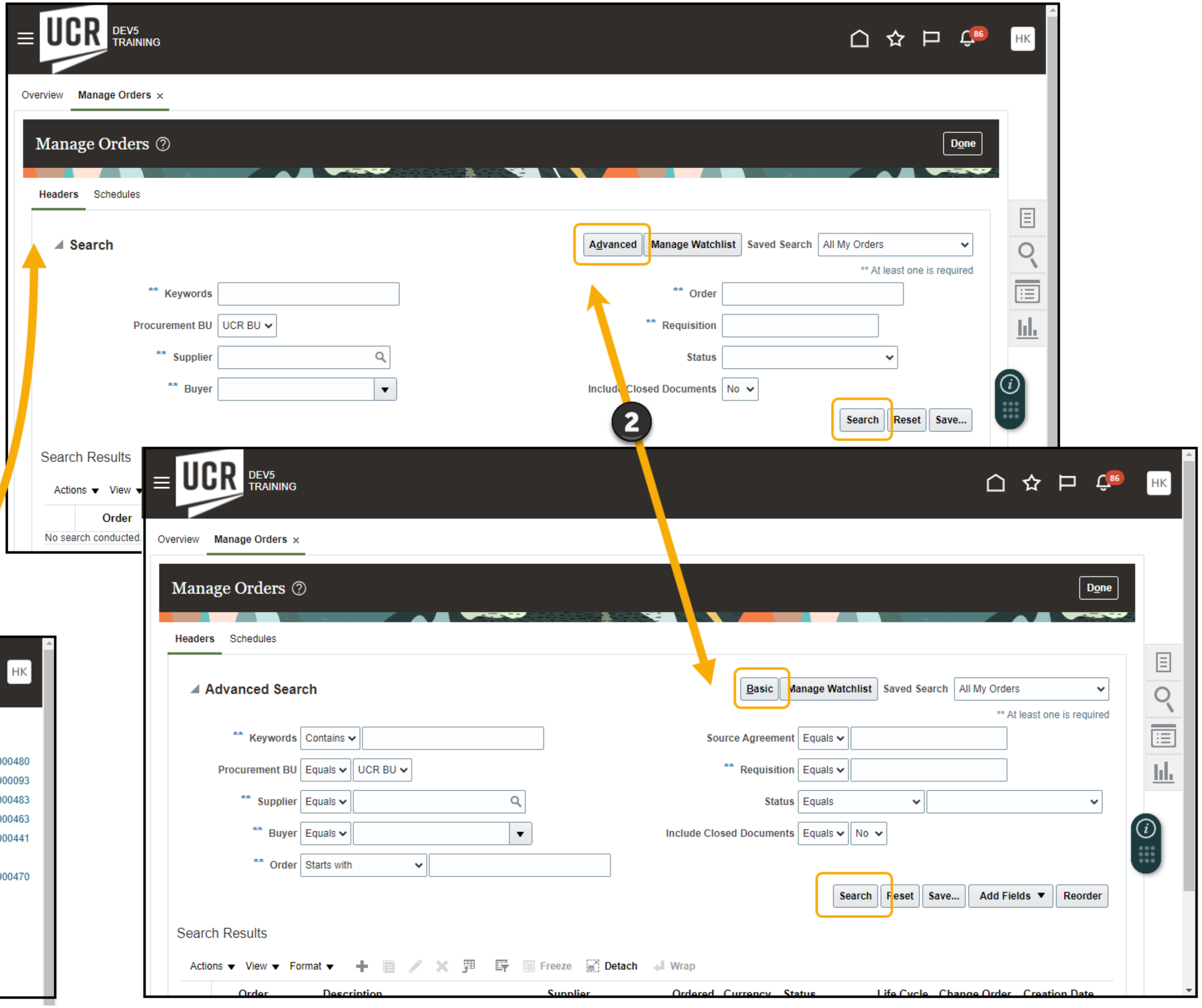


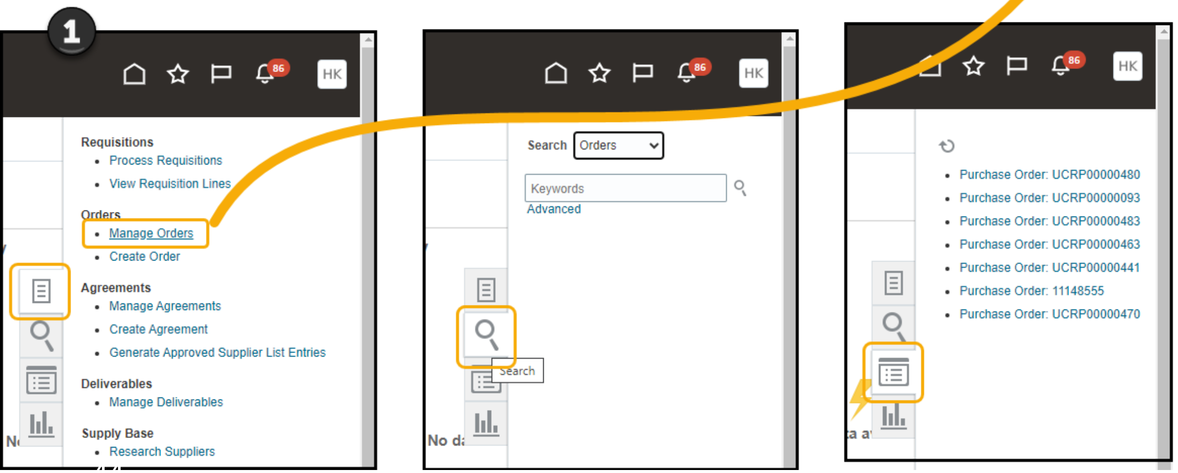
1. From the home screen, select **Requisitions**
2. On the Requisitions page, review recent requisitions or click **View More** or **Manage Requisitions**
3. Filter based on the parameter options (such as Entered by, Supplier, Requester, Etc.). For additional options you can click **Advanced**.

How do I find? …. A PO?

1. From the home screen, select **Purchase Orders.** On the PO page, **click one of the icons** on the right to find POs. The **Tools** will take you to a detailed Search. (**Magnifying glass** will give you a simple search; the **List icon** will show recently opened POs).

2. Filter based on the parameter options. For additional options you can click **Advanced**.

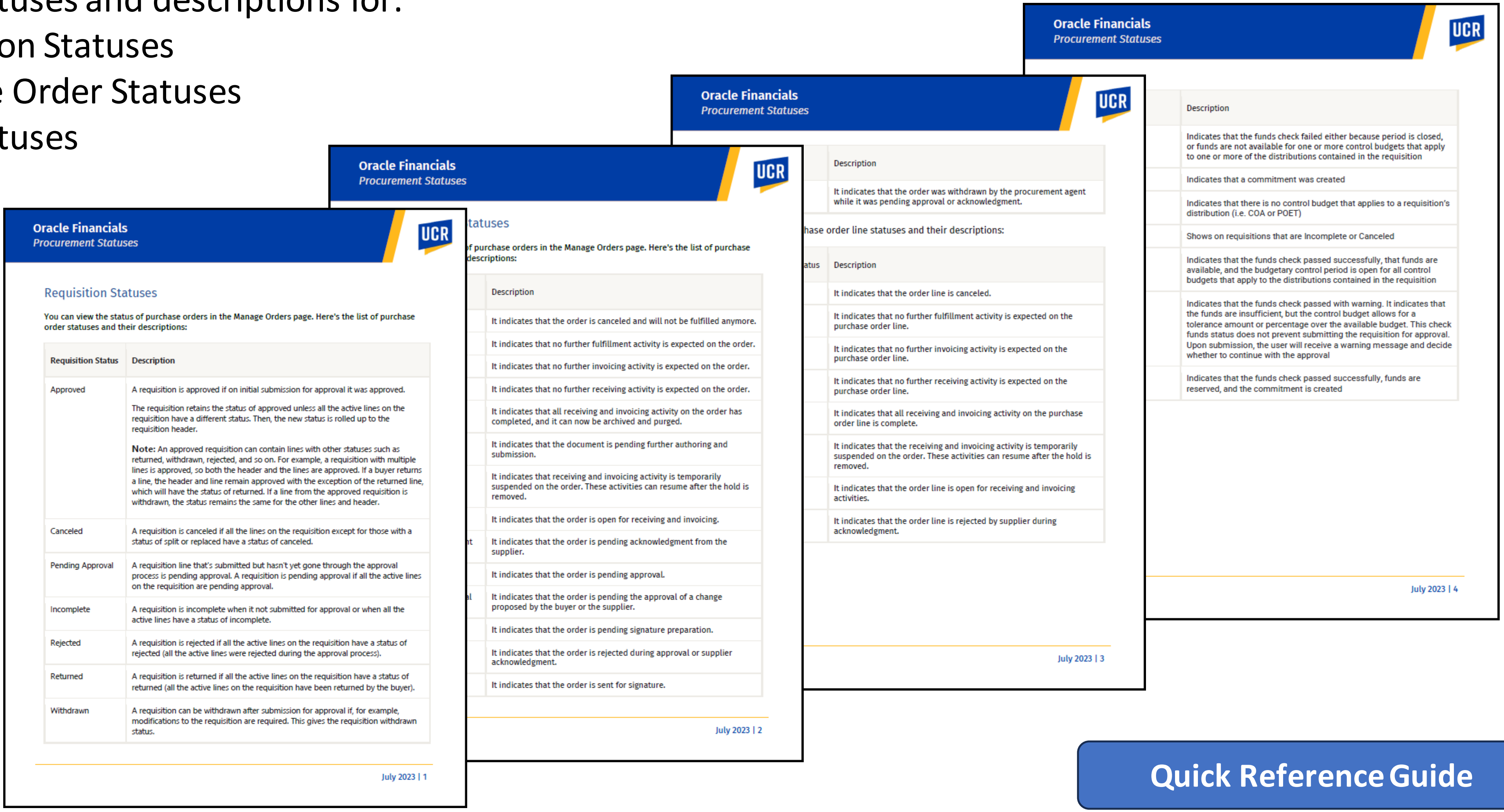




What Does the Status Mean?

The new Procurement Statuses guide contains statuses and descriptions for:

- Requisition Statuses
- Purchase Order Statuses
- Fund Statuses



Oracle Financials
Procurement Statuses

UCR

Description

Indicates that the funds check failed either because period is closed, or funds are not available for one or more control budgets that apply to one or more of the distributions contained in the requisition

Indicates that a commitment was created

Indicates that there is no control budget that applies to a requisition's distribution (i.e. COA or POET)

Shows on requisitions that are Incomplete or Canceled

Indicates that the funds check passed successfully, that funds are available, and the budgetary control period is open for all control budgets that apply to the distributions contained in the requisition

Indicates that the funds check passed with warning. It indicates that the funds are insufficient, but the control budget allows for a tolerance amount or percentage over the available budget. This check funds status does not prevent submitting the requisition for approval. Upon submission, the user will receive a warning message and decide whether to continue with the approval

Indicates that the funds check passed successfully, funds are reserved, and the commitment is created

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Oracle Financials
Procurement Statuses

UCR

Description

It indicates that the order was withdrawn by the procurement agent while it was pending approval or acknowledgment.

hase order line statuses and their descriptions:

atus | Description

It indicates that the order line is canceled.

It indicates that no further fulfillment activity is expected on the purchase order line.

It indicates that no further invoicing activity is expected on the purchase order line.

It indicates that no further receiving activity is expected on the purchase order line.

It indicates that all receiving and invoicing activity on the purchase order line is complete.

It indicates that the receiving and invoicing activity is temporarily suspended on the order. These activities can resume after the hold is removed.

It indicates that the order line is open for receiving and invoicing activities.

It indicates that the order line is rejected by supplier during acknowledgment.

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Oracle Financials
Procurement Statuses

UCR

tatuses

f purchase orders in the Manage Orders page. Here's the list of purchase descriptions:

Description

It indicates that the order is canceled and will not be fulfilled anymore.

It indicates that no further fulfillment activity is expected on the order.

It indicates that no further invoicing activity is expected on the order.

It indicates that no further receiving activity is expected on the order.

It indicates that all receiving and invoicing activity on the order has completed, and it can now be archived and purged.

It indicates that the document is pending further authoring and submission.

It indicates that receiving and invoicing activity is temporarily suspended on the order. These activities can resume after the hold is removed.

It indicates that the order is open for receiving and invoicing.

It indicates that the order is pending acknowledgment from the supplier.

It indicates that the order is pending approval.

It indicates that the order is pending the approval of a change proposed by the buyer or the supplier.

It indicates that the order is pending signature preparation.

It indicates that the order is rejected during approval or supplier acknowledgment.

It indicates that the order is sent for signature.

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Oracle Financials
Procurement Statuses

UCR

Requisition Statuses

You can view the status of purchase orders in the Manage Orders page. Here's the list of purchase order statuses and their descriptions:

Requisition Status	Description
Approved	A requisition is approved if on initial submission for approval it was approved. The requisition retains the status of approved unless all the active lines on the requisition have a different status. Then, the new status is rolled up to the requisition header. **Note:** An approved requisition can contain lines with other statuses such as returned, withdrawn, rejected, and so on. For example, a requisition with multiple lines is approved, so both the header and the lines are approved. If a buyer returns a line, the header and line remain approved with the exception of the returned line, which will have the status of returned. If a line from the approved requisition is withdrawn, the status remains the same for the other lines and header.
Canceled	A requisition is canceled if all the lines on the requisition except for those with a status of split or replaced have a status of canceled.
Pending Approval	A requisition line that's submitted but hasn't yet gone through the approval process is pending approval. A requisition is pending approval if all the active lines on the requisition are pending approval.
Incomplete	A requisition is incomplete when it not submitted for approval or when all the active lines have a status of incomplete.
Rejected	A requisition is rejected if all the active lines on the requisition have a status of rejected (all the active lines were rejected during the approval process).
Returned	A requisition is returned if all the active lines on the requisition have a status of returned (all the active lines on the requisition have been returned by the buyer).
Withdrawn	A requisition can be withdrawn after submission for approval if, for example, modifications to the requisition are required. This gives the requisition withdrawn status.

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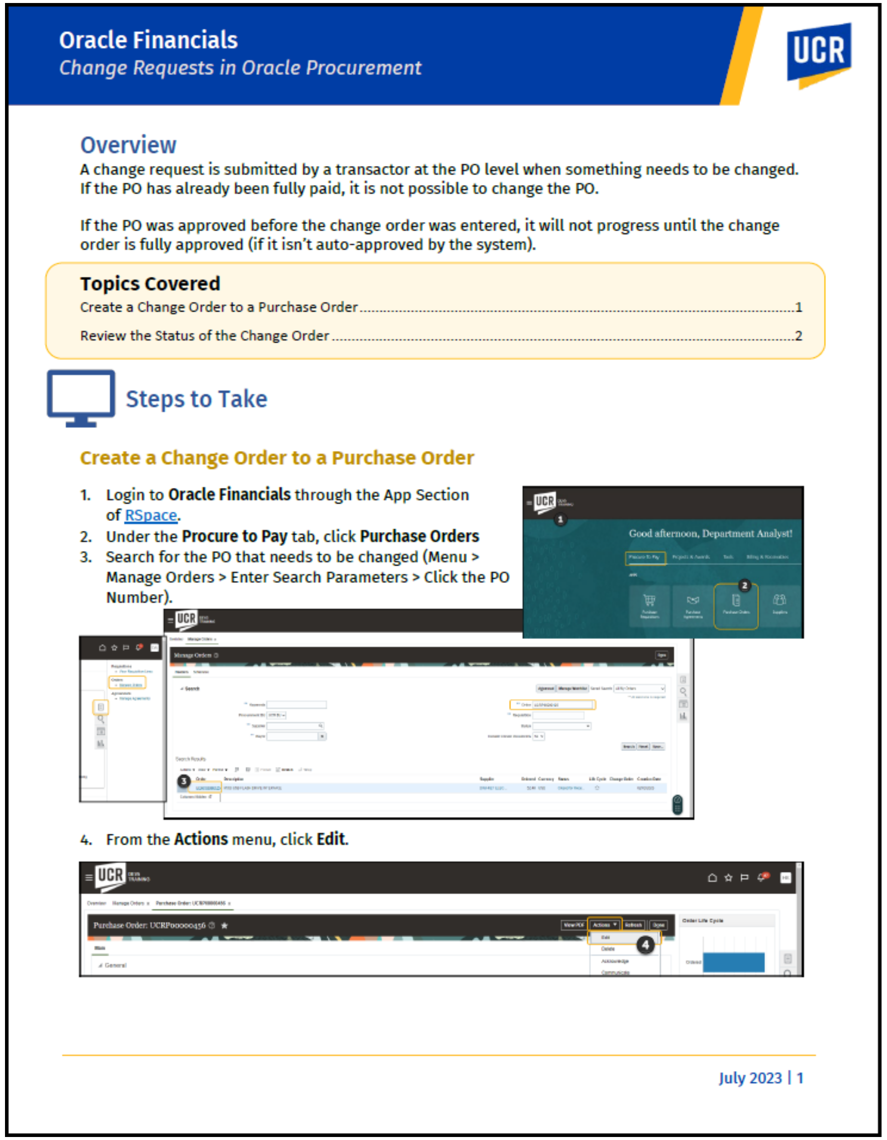
Quick Reference Guide

Still Pending? Was there a Change Order?

Job aid on how to create and review the approval process related to Change Orders.



Oracle Financials
Change Requests in Oracle Procurement

UCR

Overview

A change request is submitted by a transactor at the PO level when something needs to be changed. If the PO has already been fully paid, it is not possible to change the PO.

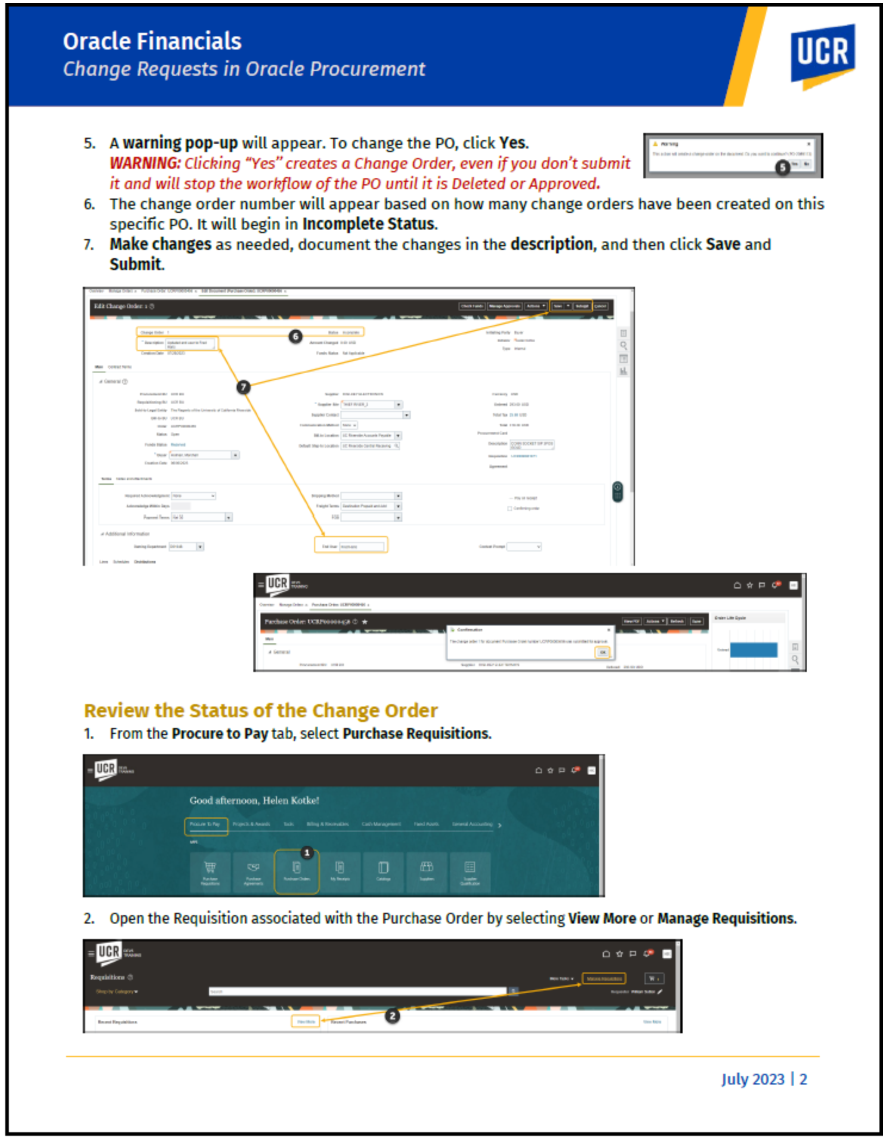
If the PO was approved before the change order was entered, it will not progress until the change order is fully approved (if it isn't auto-approved by the system).

Topics Covered

Steps to Take

Create a Change Order to a Purchase Order

1. Login to **Oracle Financials** through the App Section of RSpace.
2. Under the **Procure to Pay** tab, click **Purchase Orders**
3. Search for the PO that needs to be changed (Menu > Manage Orders > Enter Search Parameters > Click the PO Number).
4. From the **Actions** menu, click **Edit**.



Oracle Financials
Change Requests in Oracle Procurement

UCR

5. A **warning pop-up** will appear. To change the PO, click **Yes**.
   WARNING: *Clicking "Yes" creates a Change Order, even if you don't submit it and will stop the workflow of the PO until it is Deleted or Approved.*
6. The change order number will appear based on how many change orders have been created on this specific PO. It will begin in **Incomplete Status**.
7. **Make changes** as needed, document the changes in the **description**, and then click **Save** and **Submit**.

Review the Status of the Change Order

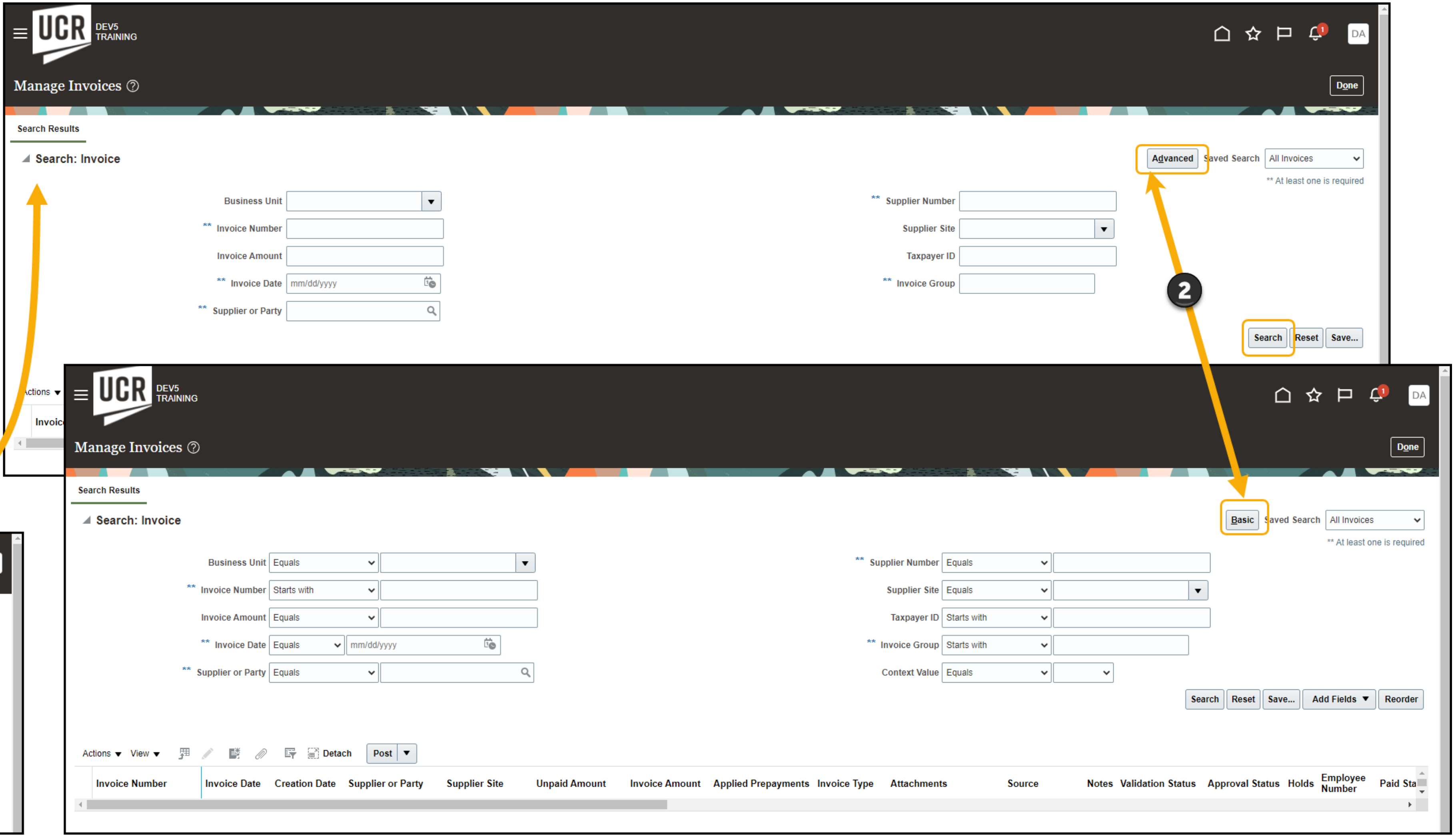
1. From the **Procure to Pay** tab, select **Purchase Requisitions**.
2. Open the Requisition associated with the Purchase Order by selecting **View More** or **Manage Requisitions**.

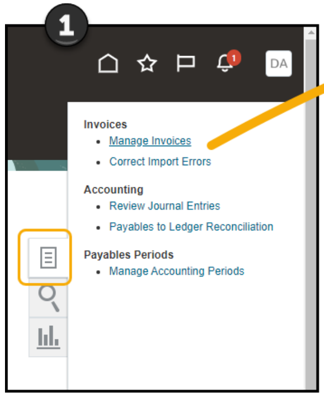
Quick Reference Guide

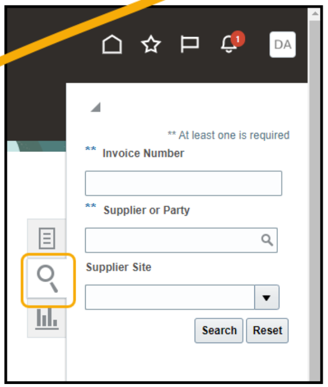
How do I find? …. An Invoice?

1. From the home screen, select **Payables Invoices.** On the Invoices page, **click one of the icons** on the right to find Invoices. The **Tools** will take you to a detailed Search. (**Magnifying glass** will give you a simple search; the **List icon** will show recently opened POs).

2. Filter based on the parameter options. For additional options you can click **Advanced**.







Worklist Creation

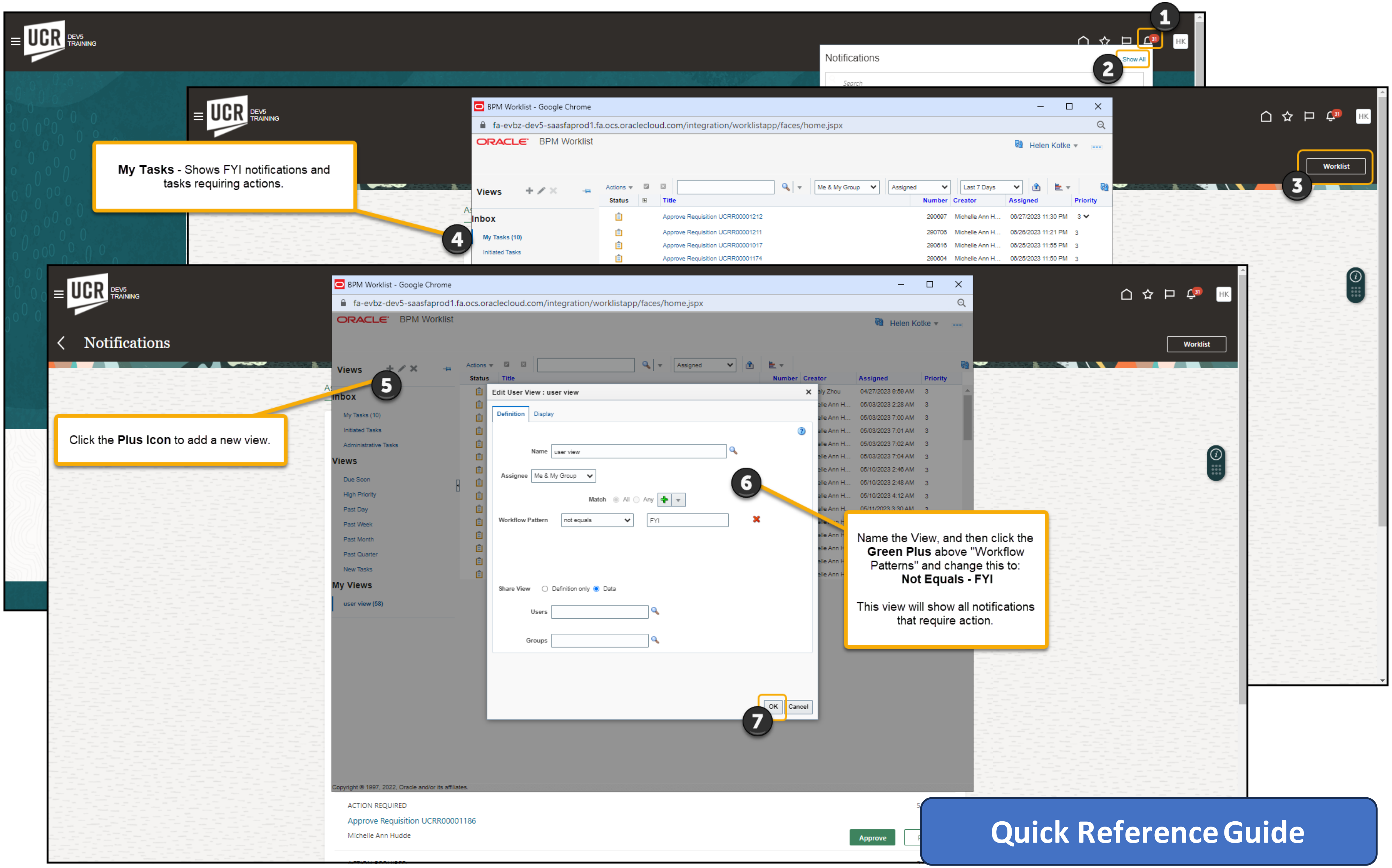
The worklist is a helpful way to manage notifications within Oracle.

Open Worklist:

1. Click bell icon
2. Select Show all
3. Click Worklist
4. My Tasks – Shows all notifications

Create a View:

5. Click the plus icon
6. Enter a name and workflow pattern
7. Once set, click OK



Quick Reference Guide

Where is “Okay to Pay”? (Receiver Role)

Reminder, “Okay to Pay” is not an Oracle term. A department-designated Receiver is identified for each department (due to the separation of duties, this should be a different person than the Transactor). If you are a Receiver that needs support, many Oracle Guided Learning guides are available to walk you through new processes (ex., Receipt Types, Create Receipt, and Partial Receipting).

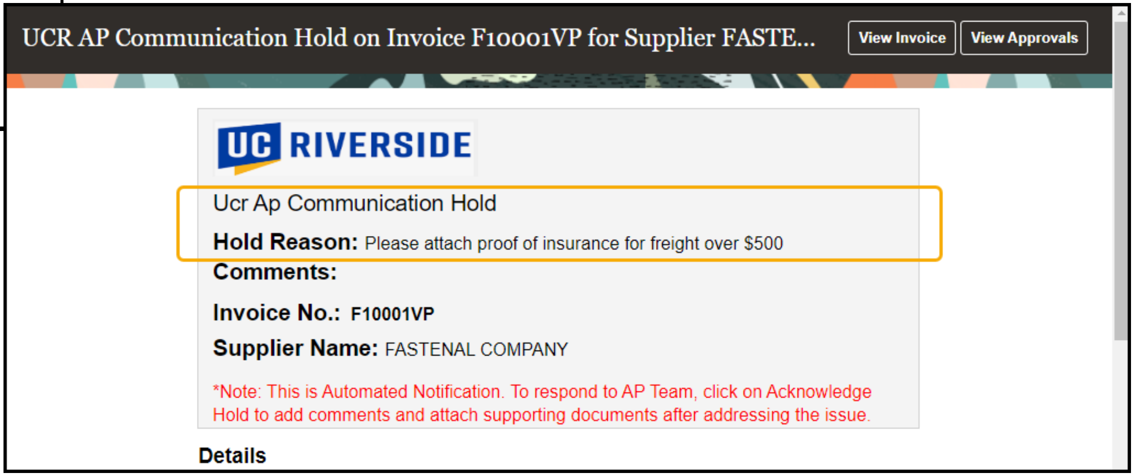
If you are getting Receiver notifications but are not the Receiver, create and submit a change order to the PO to update the Receiver to the correct individual.

Link to OGL Guide

AP Invoice Report

Invoice Holds in Oracle Financials

- **System Hold –** Automatic hold created by the system
- **AP Communication Hold –** Hold identified by AP. Reason documented by AP. ([link to quick reference guide](#)) Review comment, take action (if appropriate), write a comment back to AP, and acknowledge the hold.



How will you know that an invoice is on hold?

- **AP Communication Hold –** System notification (bell icon/worklist) or UCR AP Report for Invoices
- **System Hold –** UCR AP Report for Invoices

How to run the report:

- **Open the report**
  - **Magnifying glass –** Search "AP Invoice"; uncheck exact match; location - all; sub-folder checked; type - report
  - **Folders –** shared folders/custom/UCR/reports/financials/accounts payable/BI
- Select the **Owning Department**
- Select the **Output Type** and click **Apply**
- Review the **Hold Reason column** in the report to determine if any should be remedied by the department

Department Action Hold Reasons

Hold Reason	Description
Account Ordered	Amount billed exceeds amount ordered.
Account Received	Account billed exceeds amount received.
Cannot close PO	Cannot close PO before schedule is fully delivered.
Cannot try PO close	Cannot close PO because invoice has unreleased holds.
Consume Quantity	Billed quantity exceeds consumed quantity.
Final matching	PO was already final matched to another invoice.
Insufficient funds	Insufficient funds exist for this invoice.
Maximum consumed quantity	Billed quantity exceeds consumed quantity by tolerance amount.
Maximum ordered amount	Billed amount exceeds ordered amount by tolerance amount.
Maximum received quantity	Billed quantity exceeds received quantity by tolerance amount.
Maximum scheduled amount	Variance between invoice and schedule amount exceeds limit.
Ordered Quantity	Billed quantity exceeds ordered quantity.
PO not approved	Invoice matched to unapproved purchase order.
Price	Invoice price exceeds purchase order price for PO or receipt matched invoice line and exceeds consumption advice price for consumption advice price for consumption advice matched invoice line.
Quality	Billed quantity exceeds accepted quantity.
Received quantity	Billed quantity exceeds received quantity.
Receiving exception	Exception exists for purchase order receipt.
UCR AP Communication	Reason documented by AP. Review comment, take action (if appropriate), write a comment back to AP, and acknowledge the hold.

Department Action – Invoice System Holds QRG

UC RIVERSIDE

Department Action Hold Reasons

Hold Reason	Description
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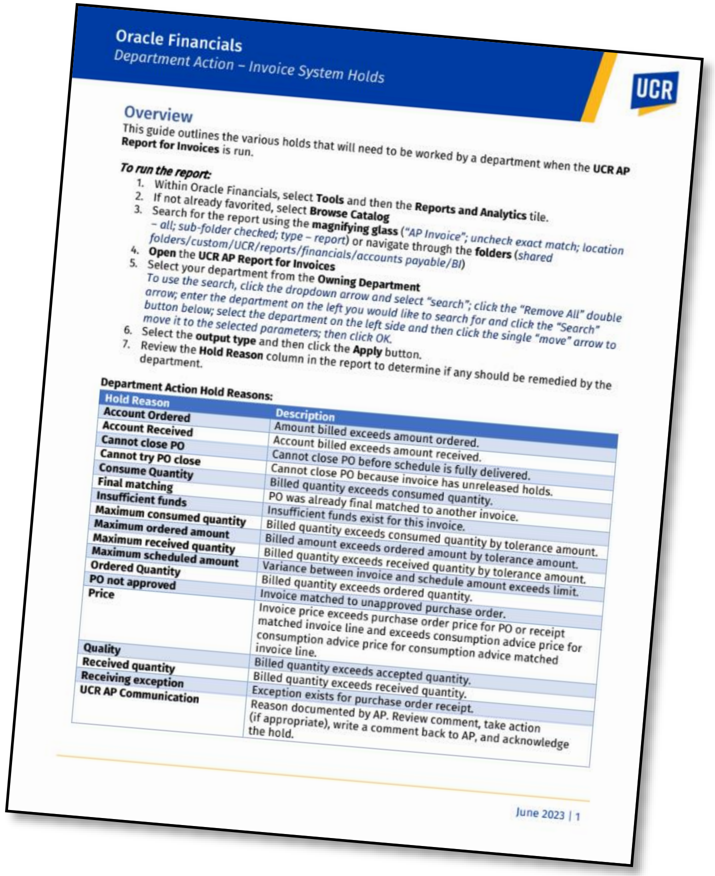
Oracle Financials
Department Action – Invoice System Holds

UCR

Overview

This guide outlines the various holds that will need to be worked by a department when the **UCR AP Report for Invoices** is run.

To run the report:

1. Within Oracle Financials, select **Tools** and then the **Reports and Analytics** tile.
2. If not already favorited, select **Browse Catalog**
3. Search for the report using the **magnifying glass** (*"AP Invoice"; uncheck exact match; location – all; sub-folder checked; type – report*) or navigate through the **folders** (*shared folders/custom/UCR/reports/financials/accounts payable/BI*)
4. **Open** the **UCR AP Report for Invoices**
5. Select your department from the **Owning Department**
   To use the search, click the dropdown arrow and select "search"; click the "Remove All" double arrow; enter the department on the left you would like to search for and click the "Search" button below; select the department on the left side and then click the single "move" arrow to move it to the selected parameters; then click OK.
6. Select the **output type** and then click the **Apply** button.
7. Review the **Hold Reason** column in the report to determine if any should be remedied by the department.

Department Action Hold Reasons:

Hold Reason	Description
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[Department Action – Invoice System Holds QRG]

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Column added - UCR Purchase Order Encumbrance Report

- This column was added to reflect the Burden Cost, aka "indirect costs" associated with Contract and Grant PO purchases. For further guidance on this topic, you can refer to the resource: Contract and Grants Burden Costs Guide.

- The column was added so that the encumbrance total on the **Financial Transaction Detail Report** would align with the amounts reported on the **UCR Purchase Order Encumbrance Report**.

Looker Training & Communication – *August 2023*

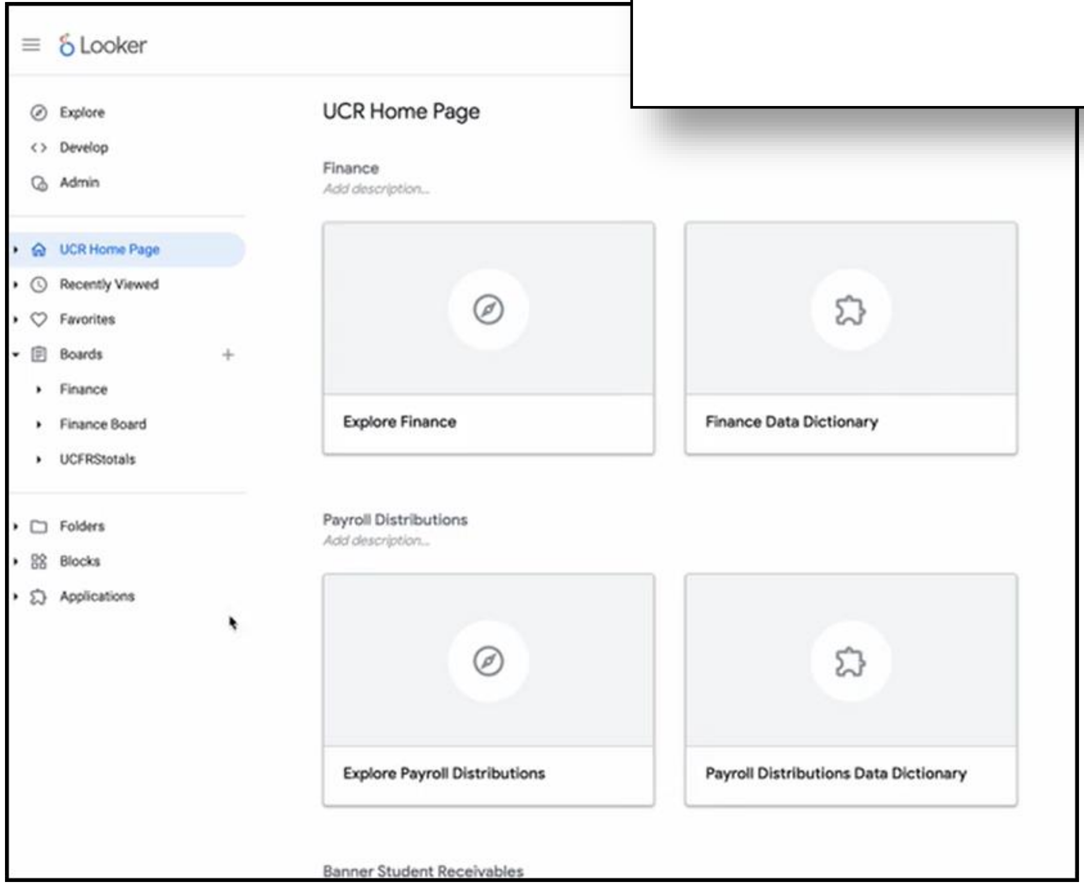
Current Training Available:

- Reporting Tools and Dashboards (Web-based training/Workshop)
- Video Walkthroughs:
  - Looker – Finance
  - Looker – Payroll Distributions

Upcoming Training:

- Updated Reporting Tools and Dashboard
- Case Study Demo Videos
  - Looker – Finance
  - Looker – Payroll Distributions

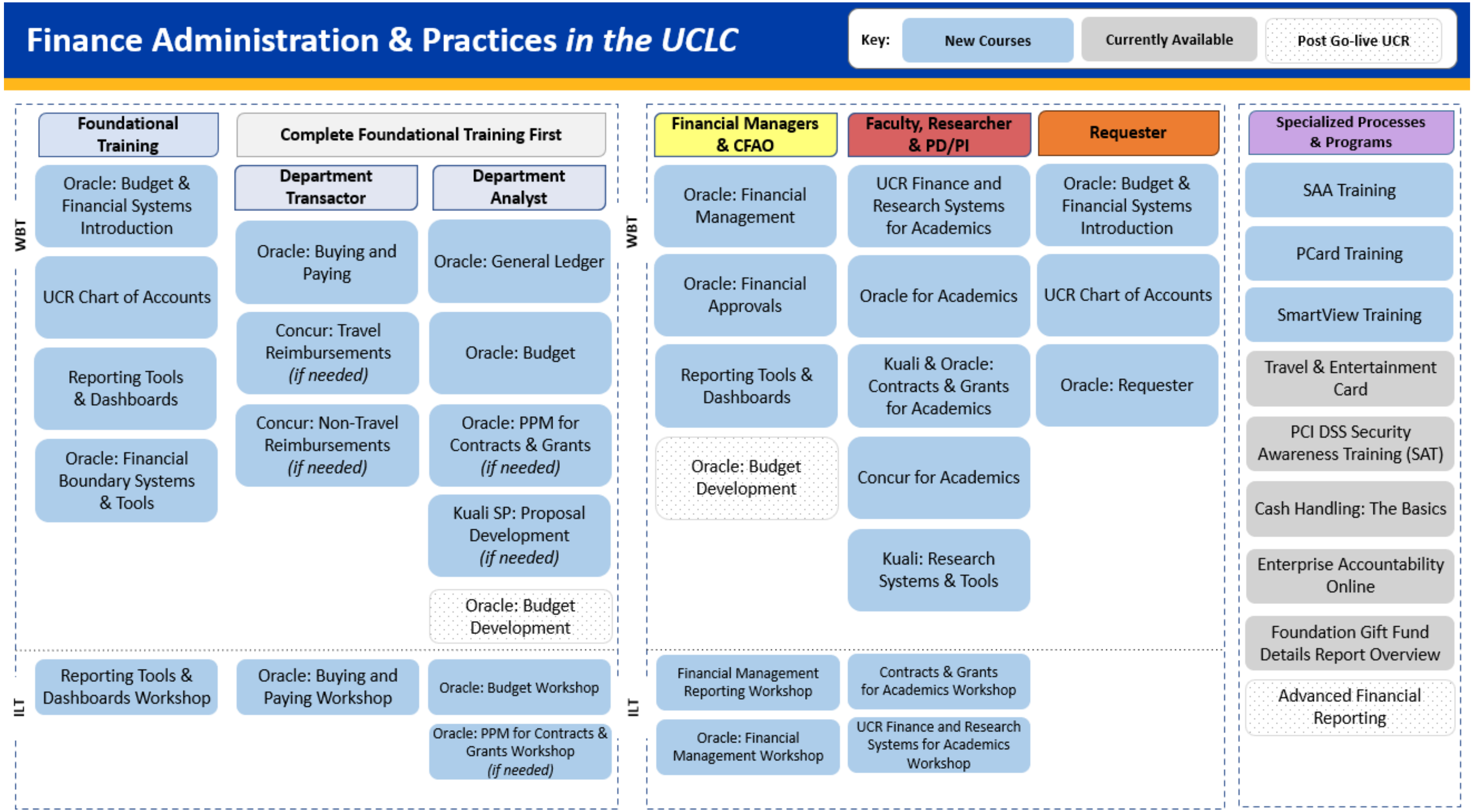
Additional communication and support information to come as we progress towards early August when there will be a month's worth of data within the system.



Training Feedback?

Think the training is great? Think it is not? Needs improvement?

Please share actionable feedback so that we can continue to make the courses more impactful!



Link to Survey

Faculty Workshops! Coming up!

Faculty, Researcher & PD/PI

UCR Finance and Research Systems for Academics

Oracle for Academics

Kuali & Oracle: Contracts & Grants for Academics

Concur for Academics

Kuali: Research Systems & Tools

Contracts & Grants for Academics Workshop

UCR Finance and Research Systems for Academics Workshop

These workshops are opportunities to practice content provided in the Web Based Trainings.

Participants should ***only register for one*** *of the two sessions based on if the Faculty, Researcher, PD/PI use the contracts & grants.*

Finance & Research Systems for Academics (Non-Contract & Grants)	9/1/23 9-9:30	10/13/23 8:30-9	11/3/23 9-9:30
Package: **Finance & Research Systems for Academics** and **Contracts & Grants for Academics Workshop**	9/7/23 8:30-9:30	10/9/23 9:30-10:30	11/17/23 12-1pm

Link to Learning Path

What's Available on the Websites?

[Impact23]

- About the project
- Stay connected (recorded meetings, etc.)
- Cutover & FYE Close details
- Concur, Kuali, Oracle & Reporting
- Training (Learning Paths, Oracle Guided Learning, Concur FAQs, & Oracle FAQs)
- Support (Known Issues Tracker, Communities of Practice, Office Hours, Help Tickets, & Concierge Line)

FP&A – New Financial Information tab

- COA Management Guide
- Installing SmartView
- OGL Extension
- Budget Q&A
- Budget Support

Question & Answer

Enter your questions in the Q&A feature

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IMPACT23

Thank you!

Website: Impact23.ucr.edu