

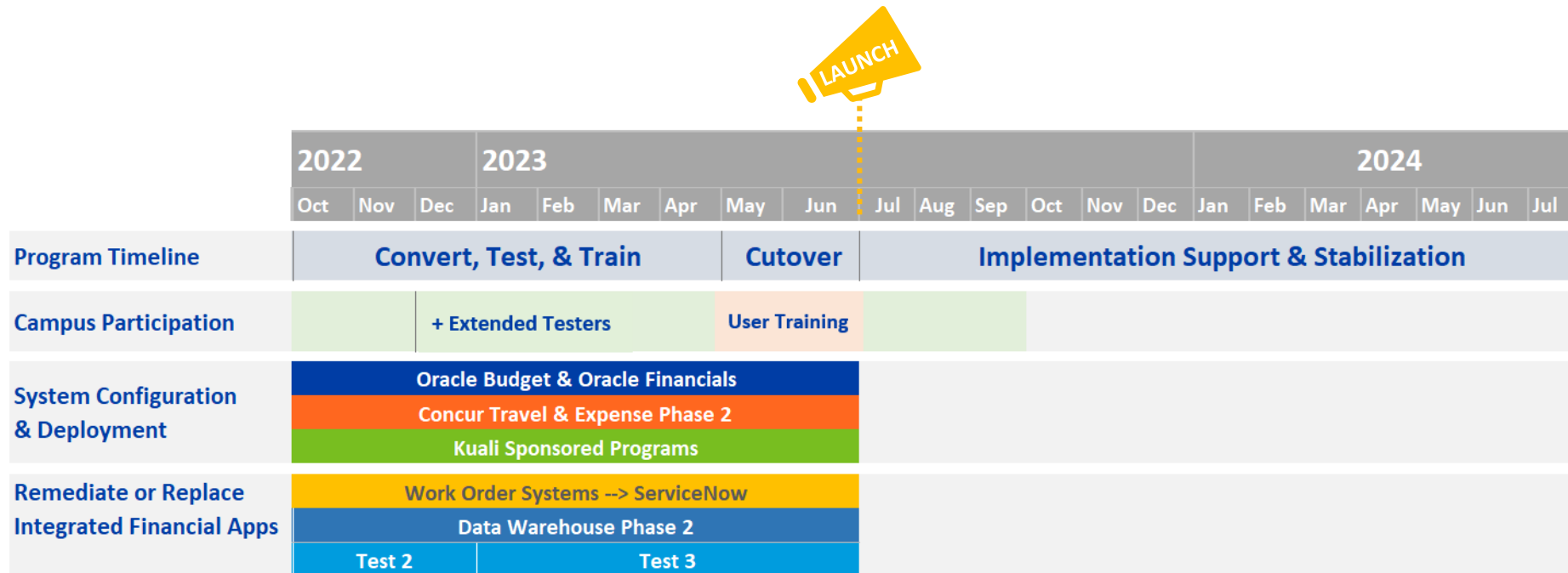
Impact23 Program

Briefing Deck

Impact23 Program & Timeline

The Impact23 program is a multi-year initiative to **replace our financial system** and transform how UC Riverside (UCR) transacts, develops budgets, tracks spending/revenue, and performs financial reporting.

The program is a collaborative project involving BFS, ITS, FP&A, Research (RED), our implementation partners, and campus stakeholders to implement a comprehensive suite of cloud-based solutions: **Oracle, Concur, and Quali.**



[Implementation Timeline | Impact23 \(ucr.edu\)](#)



REASONS FOR CHANGE

- UC Office of the President has mandated adoption of a common chart of accounts by July 2023
- UCR formally evaluated options via an RFI in 2018, and all RFI responses recommended Oracle Cloud vs. other options, which included upgrading existing systems
- Campus last upgraded its financial systems in 2005, from a 1999 implementation, and UCR's current PeopleSoft version (8.8) is no longer supported as of May 2019
- Many of the business applications (e.g., eBuy, iTravel) are end of life and not feasible to update without impacting financial systems
- UCR campus departments need more robust reporting, and data analytics to best perform fiscal responsibilities



PROGRAM OBJECTIVES

- Minimally customized, configuration-driven financial system
- Future-proof solution to allow for feature and security upgrades, with continued vendor support
- Implement leading practices and business process transformations
- Deliver meaningful benefits to campus users
- Learn from the UCPath implementation
- Learn from other UC implementations




What is Changing?

Modernizing UC Riverside’s Financial Systems

Deploying 7/2023

Phase 1 Deploy 7/22
Phase 2 Deployment 7/2023

Expected
deployment 7/2023

UCRFS – eBuy – eAward					iTravel	eCAF
 <p>Delivers financial applications designed to automate and streamline financial management and budget processes. This system has become a standard in the UC system</p>					 <p>Provides an automated, customer-focused travel and expense solution (deployed 7/2022).</p>	 <p>Offers a research solution for pre-award.</p>
Record to Report	Projects & Grants	Procure to Pay	Planning & Budgeting	Financial Reporting	Travel & Expense	Sponsored Programs
<ul style="list-style-type: none"> General Ledger Chart of Accounts Banking Asset Management 	<ul style="list-style-type: none"> Contracts & Grants Capital Projects Related Receivables 	<ul style="list-style-type: none"> Procurement Payables Payment Supplier Management 	<ul style="list-style-type: none"> Financials and Workforce Planning and Budgeting 	<ul style="list-style-type: none"> Financial Reports and Analytics 	<ul style="list-style-type: none"> Travel Requests Travel Reimbursements Travel Booking Conversion to Corporate T&E Card Card Requests Phase2 in July 2023 will expand the functionality 	<ul style="list-style-type: none"> PreAward Requests Grants Management *Research Compliance (separate from Impact23 program)

What are the Impacted Systems?

Boundary Systems

A **Boundary System** is a UCR ITS custom-developed application, or configured third-party system, that interacts with the campus financial system and/or financial data (meaning, the boundary system pulls data from or pushes data to the Oracle financial system).

- Examples: Work Order Systems (Fleet Service for UCR Vehicle Rental), Financial Reporting, UCPATH, etc.

Show 50 entries Search:

Track	Application Name	Replacement Application or Rework
Boundary System - UCPATH Financial Tools	UCPATH GLI	Retrofit
Boundary System - UCPATH Financial Tools	Salary Cost Transfer Request	Retrofit
Boundary System - Work Order System	ScotSupply	Retrofit
Boundary System - Work Order System	MediaWorks	Retrofit
Boundary System - Work Order System	Facilities WOS	Rebuild into FAMS360
Boundary System - Work Order System	Web Recharge	Rebuild into ServiceNow
Boundary System - Work Order System	Fleet Services	Rebuild into AgileFleet Commander
Boundary System - Work Order System	Printing & Repro	Rebuild into ServiceNow
Boundary System - Work Order System	Mail Services	Rebuild into ServiceNow
Boundary System	HRDW	Retrofit
Financial Reporting/Datawarehouse	SuperDope	Rebuild into Google Tools/Looker
Financial Reporting/Datawarehouse	UCRFSTotals	Rebuild into Google Tools/Looker
Planning & Budgeting	UCR Financial System (UCRFS)	Oracle Budget (EPM)
Procure to Pay	eBuy	Oracle Financials - Procurement
Procure to Pay	ProCard Transfers (PCT)	Concur Billed Statements (CBS)
Projects and Grants	PAMIS: eCAF	Kuali Sponsored Programs
Projects and Grants	PAMIS: Grants.gov System to System Submission Application	Kuali Sponsored Programs
Projects and Grants	PAMIS: COEUS	Kuali Sponsored Programs
Projects and Grants	PAMIS: PI Eligibility by Exception	Kuali Sponsored Programs
Projects and Grants	PAMIS: Pre-Award Request System	Kuali Build
Projects and Grants	PAMIS: MTA Request System	Kuali Build
Projects and Grants	PAMIS: eAward	Kuali Build
Record to Report	Golden Tree Viewer	Rebuild
Record to Report	Non-Payroll Cost Transfers (NCT)	Rebuild

Impact23 Campus Collaboration

Engagement

Impact23 Program Governance	Lead, SME, and SMA Workgroup Participants	Faculty Advisory Workgroup	Extended Tester Workgroup Participants	CFAOs, User Groups, FHROG, College & School Executive Committee and Academic Management Professionals
<ul style="list-style-type: none">• Executive Committee: Executive Sponsor, Co-Chairs, Lead Faculty Advisor• Steering Committee: Program leadership and key stakeholders serving as the voice of the customer for the program	<ul style="list-style-type: none">• Leads: UCR domain expertise• Workgroups: Subject Matter Experts & Advisors: Unique perspectives; Design new systems, business processes, and reports• Functional & Technical Workgroups: Functional/Technical Program Leads, Change Management & Training	<ul style="list-style-type: none">• Faculty Advisory Workgroup: At monthly meetings, faculty representatives from each of the schools/colleges have an opportunity to provide insights, perspectives, and recommendations.	<ul style="list-style-type: none">• Extended Testers Individuals (Faculty, Staff, & Units) serve and support workgroups dedicated to testing (Concur, Kuali, Oracle, boundary systems, and financial reports), training, and go-live support.	<ul style="list-style-type: none">• Collaborates with individuals and groups in their unit to understand and support the change• Provides input into the Impact23 change management, training, and communication plans• Escalates items to the project team to mitigate risk

Find representatives on the [Program Team](#) webpage

WHAT'S CHANGING FOR FACULTY?

What's changing for Faculty?

The Impact23 Program is a multi-year initiative to transform how UC Riverside (UCR) transacts, develops budgets, tracks spending/revenue, and performs financial reporting. Nearly all financial systems that support finance and grant management and financial reporting will be impacted on **July 1, 2023**.

Some key changes:

- All employees, including faculty, will use Oracle, Kuali, 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.
- Transactions and Faculty Financial Reports will transition from the Full Accounting Unit (FAU) to the new Chart of Accounts (COA) upon go-live.
- 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.

What can Faculty expect?

- Administrative staff will be most impacted by the switch to the new chart of accounts and financial systems.
- In March 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.
- Faculty will be kept informed along the way and can expect to receive updates and training as we get closer to launching the new systems.

For more information, visit Impact23.ucr.edu

What systems will be going away?

System/Application	Business Function(s) Supported	Future State Changes & Impacts
iTravel & ePay*	<ul style="list-style-type: none"> • Travel Reimbursements (Phase 1 Complete) • Non-Travel Reimbursements (Phase 2 In Progress) <i>Typically the only interaction with the system is IF a faculty is an event host and policy requires the host to certify</i> • Travel and Entertainment Card Program 	<p>Replaced by Concur/ePay</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"> • Purchasing Goods & Services • Revised Procurement Card Program 	Oracle Financials - Procurement
PAMIS/eCaf	<ul style="list-style-type: none"> • Pre-Award Requests • Grants Management 	<p>Replaced by Quali</p> <p><i>Note: Additional Quali Research modules will be implemented for research compliance separate from the Impact23 program, but faculty training will be provided under a single learning path</i></p>
PAMIS/PIWRS & Payroll Certification		Replaced by a standalone Payroll Certification app and new faculty reports

View a table of impacted systems - [Program Scope | Impact23 \(ucr.edu\)](#)

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 shows two overlapping screenshots from the UC Riverside Impact23 website. The top screenshot is the main website page, titled 'BUSINESS AND FINANCIAL SERVICES' and 'FINANCIAL SYSTEM REPLACEMENT PROGRAM'. It features a navigation menu with 'ABOUT', 'NEWS & EVENTS', 'REQUESTS & FISCAL CLOSE', 'CONCUR', 'EUALI', 'ORACLE', and 'CONTACT US'. The main content area has a large banner for the 'Impact23 Summit' with the text 'Join us for a month-long VIRTUAL CONFERENCE from March 6-27, 2023!' and a 'SCHEDULE OF EVENTS' button. Below the banner are sections for 'EVENT CALENDAR' and 'RECORDED EVENTS'. The bottom section is titled 'Modernizing UC Riverside's Financials' and contains introductory text about the program.

The bottom screenshot is an 'IMPACT23 INSIDER NEWS' newsletter for January 2023, 6th Edition. It features a blue header with the title and a photo of the UC Riverside campus. The main content is under the heading 'ANNOUNCEMENTS' and includes a section titled 'Impact23 Procurement Preparation Activities for Departments'. This section explains that UC Riverside's eBuy procurement system will be replaced by Oracle Procurement in July 2023, detailing the transition process, the increase of the Procurement Card (PCard) threshold to \$10K, and the integration of PCard transactions into Concur. It also mentions that the department authorized purchase order (DAPO) threshold will increase to \$10K. At the bottom of the newsletter, there is a section for 'ORACLE PROCUREMENT PUNCHOUT DAPO PREVIEW' with a video player showing a requester completing a DAPO from a punchout catalog.

JOIN US AT THE IMPACT23 SUMMIT

VIRTUAL CONFERENCE

UCR Faculty are invited to gain insight into new Impact23 financial management systems and business processes changing on July 1, 2023 during the following sessions:

Tuesday, March 14

11:00-11:45 AM – Navigating Impact23 as an Academic
12:00-12:45 PM – Intro to Kualo Proposal Dev, including COI
1:00-1:45 PM – Kualo Research Tools
2:00-2:45 PM – How to Maintain your Award in Oracle

Wednesday, March 22

12:00-12:45 PM – Faculty Portfolio and Financial Reporting

[CLICK HERE FOR MORE INFORMATION](#)

Making an Impact

The Impact23 Program: Modernizing UC Riverside's Financial Systems

Countdown to Launch
July 1, 2023



Email: Impact23@ucr.edu
Website: Impact23.ucr.edu

