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).

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Impact23 Program
Timeline & Testing

Asirra Suguitan
Impact23 Program
Functional Lead
Modernizing UC Riverside's Financial Systems

We Are Here!

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Implementation Timeline | Impact23 (ucr.edu)
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

Revised Looker Timeline

Josh Hoerger
Impact23 Program
Functional Project Manager
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

Revised Transition Plan

Bobbi McCracken
AVC & Controller
Impact23 Co-Sponsor
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)

<table>
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<tr>
<th>OLD FAU by Fund</th>
<th>New COA by Award</th>
<th>PRC Pay Periods Covered</th>
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<tr>
<td><strong>REVISED</strong></td>
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<td>Normal cycle/schedule</td>
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<td>Normal schedule July 22-June23; distributed to coordinator 7/12; distributed to PI 7/22; due 8/15</td>
<td>Distributed to coordinator 9/15; distributed to PI 10/1; due 10/25</td>
<td>Jul-23</td>
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<td>Jun-23</td>
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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

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<td>July 23-June 24</td>
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Fixed Price Conversion

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

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

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!

- Next SAA Training is on June 6th @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).
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
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

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 Zoom Line
- Concierge Service Areas:
  - Budget
  - Concur Travel & Expense
  - Grants & Contracts
  - Procure to Pay
  - Financial Reporting
Enter your questions in the Q&A feature
Thank you!

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