

IMPACT23 INSIDER NEWS



July 2022 | 2nd Edition

ANNOUNCEMENTS

New Concur Travel System is Live as of July 25!

The Impact23 Program Team is pleased to announce the new Concur Travel and Expense system is now available for use. The Concur travel system deployment marks an important milestone for UC Riverside and the Impact23 Program, with staff across the campus contributing time to the business system design, testing, and department pilot. Concur Travel and Expense allows the campus to move towards its vision for a comprehensive travel system to facilitate travel bookings, reduce out-of-pocket expenditures, and expedite reimbursements. Below are a few pertinent transition details:



- iTravel continues to be available until approximately 9/1/2022 to process previously entered requests.
- New travel requests and expense reports should be entered in Concur.
- New cash advance requests must be entered in Concur. All outstanding cash advances in iTravel must be reconciled by 8/15/2022 and final approved by 8/22/2022 to ensure a smooth transition to Concur.
- The US Bank personal liability card program is retiring. New purchases on the US Bank personal liability cards will be restricted on approximately 10/1/2022.

[Read the full Deployment Announcement](#)

[View Concur Training & Support options](#)

Concur Access Reminders

- A Department System Access Administrator (SAA) must explicitly provision users with a Concur role in the Enterprise Access Control System (EACS). View instructions on establishing [Concur Access](#).
- The role establishment/departmental processes may still be in progress. Please check with your SAA/administrative staff to confirm your access has been granted. Your patience is appreciated as we transition to the new system!
- When [logging in to Concur](#), please use your **"NETID@ucr.edu"** for the Concur Sign In verified email address. If "Sign in with University Credentials" does not display after entering your NETID@ucr.edu, the role set up in EACS has not yet interfaced with Concur.



Chart of Accounts Update

UC Riverside will implement a revised Chart of Accounts when we launch the Oracle financial system in July 2023. UCR's new Chart of Accounts (COA) was designed based on a common chart of accounts across the UC system and to meet UC reporting requirements. ***The workgroup attempted to retain UCRFS values and/or existing FAU structures where feasible.***

Please read the linked one-page overview(s) and register for the August Impact23 Town Hall where we will walk you through the new Chart of Accounts design. The new COA will be one of the largest changes associated with the new financial system implementation.

[Chart of Accounts Segment Design and Definitions](#)
[PPM and POETAF Segment Design and Definitions](#)

Impact23 in the Configure & Build Phase

After completing design activities at the end of April, Impact23 is well into the Configure & Build phase of the program, which runs from May-October 2022. This phase is focused on configuring new financial systems to meet UC Riverside's needs. The scope and complexity of the Configure & Build phase are reflected in the numerous user stories collected throughout the prior phase of the project - System Design. These user stories serve as the foundation for system configurations throughout the Configure & Build phase, and capture the "who", "what" and "why" the system is configured to meet various stakeholder requirements.

[Learn about UCR User Stories and the Configure & Build timeframe](#)

Preparing for Impact23 and Understanding Design Decisions

How are Impact23 decisions made?

Concur, Quali, and Oracle have options, even if they are different from the current state. By having both Subject Matter Experts (SMEs) and Subject Matter Advisors (SMAs) in the [functional workgroups](#), feedback from users is part of the process of informing decisions. Alternate solutions are explored when a system's out-of-the-box functionality and associated business process may not "work" for a particular area. At a high-level, see the Impact23 program decision making process below.



Decisions are documented and communicated, and in many cases a Key Design Decision (KDD) is drafted for program governance approval. KDDs typically include a description of the decision needed, which processes and areas are impacted, determine options for consideration with pros and cons, and highlight the functional workgroups recommended option to support a decision. Once KDDs are presented to program governance for approval, they are then communicated through the various program channels - i.e., Insider News, Impact23 website, and User Groups

Kuali Sponsored Programs

System Implementation Scope is Steering Committee Approved

Kuali is an integral part of the Impact23 comprehensive suite of cloud-based solutions and is a Software as a Service (SaaS) application for managing the research administration lifecycle.

The Kuali Sponsored Programs for Pre-Award Management offers a research solution that allows investigators and administrators the opportunity to collaborate and produce high-quality proposals. Kuali enables proposal compliance with requirements at both the sponsor and institutional levels.

Kuali Sponsored Programs are in the discovery phase and will go live as part of Impact23 on **July 1, 2023**. As a part of this effort, Kuali Sponsored Programs will integrate with Oracle Project Portfolio Management (PPM) and replace the following PAMIS applications:

- **COEUS**
 - UCR's contract and grand management data system
- **eCAF**
 - UCR's homegrown proposal approval routing system
- **Grants.gov System to System Submission Application**
 - Vendor system used to submit federal proposals that go through Grants.gov as a system-to-system proposal
- **eAward**
 - UCR's custom portal for award fund establishment, award budgeting, and award documents

The **Kuali Sponsored Programs for Post-Award Management** (non-financial) are for awards that have been granted to the institution. After this process, award data may be captured for management purposes and all relevant data may be kept in one place. The modules included are Award, Report Tracking, and Subaward.

Kuali Build empowers staff across campus with forms and workflow automation platforms to quickly transform a manual process into a digital form with automated notifications. The Kuali Build kickoff is targeted for the first week of August and will integrate with Kuali Sponsored Programs to replace the following PAMIS applications:

- **MTA Request System**
 - UCR's homegrown system to transfer material in and out of UCR
 - Used to initiate Data Use Agreements (DUA) and Confidential Disclosure Agreements (CDA)
- **Pre-Award Request System**
 - UCR's homegrown system to request pre-award spending in advance of budget period.
- **PI Eligibility by Exception**
 - UCR's home grown system used to request PI status for anyone without PI status by policy.

Recent Design Decisions

TRAINING & SUPPORT



Your Guide to Finding Training and Help as we Modernize UC Riverside's Financial Systems!

Training will be available as we roll out new systems to provide you with a broad system overview and the skills you need to perform your duties.

Register for the Impact23 Town Hall Today!



As part of our continuous efforts to prepare and educate the campus, we will be hosting another Town Hall session on **Thursday, August 25 at 1:30 - 3:00 pm**. We will record the meeting and make it available for viewing for those who cannot attend. Program updates to include:

- Concur Travel and Expense, Quali Sponsored Programs, Oracle Budget & Oracle Financials system Updates
- Technical and Financial Reporting
- Training Overview
- Chart of Accounts Design

[CLICK HERE](#)
Town Hall Registration



Concur Office Hours & User Group

August Dates Available

Business and Financial Services staff are available to assist users who have questions about Concur Travel and Expense. Travel Arrangers and Travelers who book business travel in Concur can further their understanding of pre-trip authorization, travel booking options, paying with the Travel & Entertainment Card, processes for reporting travel expenses on an expense report, and how to take advantage of mobile tools.

UCR Concur Travel and Expense

Next Training Date: August 17 @ 12:00 pm

Course Details: Virtual Instructor-Led Training (VILT) / 3 Hours

Employees who travel or book business travel can further their understanding of pre-trip authorization, booking travel via Concur, paying with the Travel & Entertainment Card, Concur processes for reporting travel expenses on an expense report, and how to take advantage of mobile tools.

Travel & Entertainment Card

Course Details: eCourse / Online Self-Paced / 30 Minutes

If you travel or entertain on behalf of UC Riverside, you should apply for a Travel & Entertainment (T&E) Card. This training is required in order to apply for and use a T&E Card. If you support T&E Cardholders and want to learn more about the request process, card requirements, and allowable usage, this training is for you too!

Contact the team at Impact23@ucr.edu