



DELOITTE HIGHER EDUCATION

Client Success Story

University of California, Riverside

University of California, Riverside

Streamlining Success: UC Riverside's ERP Transformation

A doctoral university with very high research activity, the University of California Riverside (UCR) is among the top 1.3% of universities worldwide, according to the Center for World University Rankings, continues to be named a national leader among public universities for social mobility by U.S. News and is a new member of the prestigious Association of American Universities (AAU).



Background

For nearly two decades, UCR has utilized Oracle Peoplesoft ERP (Enterprise Resource Planning) to manage its finance operations. In 2021 UCR initiated a Finance Transformation program – Impact23 – aimed at implementing new technology, enhancing business processes, and improving user productivity and financial performance.

UCR selected Oracle's Financials and Enterprise Performance Management (EPM) cloud services, and selected Deloitte as a system implementation partner for the enterprise modernization program. UCR's objectives included a reduction in customizations, alignment with the University of California's system-wide chart of accounts, and improved visibility through encumbrance accounting for sponsored contracts and grants.



Process

With modern technology and standard business processes underscoring the implementation, the Impact23 project included modules for general ledger, procurement, accounts payable, accounts receivable (non-student), financial reporting, supplier management, asset management, banking, and grant and contract management as well as pre-award and travel expense reporting. Oracle's EPM for budgeting and planning rounded out the Oracle application footprint.

As Deloitte and UCR progressed through the implementation, several decisions, including the following, enabled the project to remain on schedule and on budget:

- **Convert strategically:** Designed data conversions around essential information required to process pending transactions and required reporting in the new system and maximized the use of system interfaces to minimize rekeying of data.



Process (cont'd)

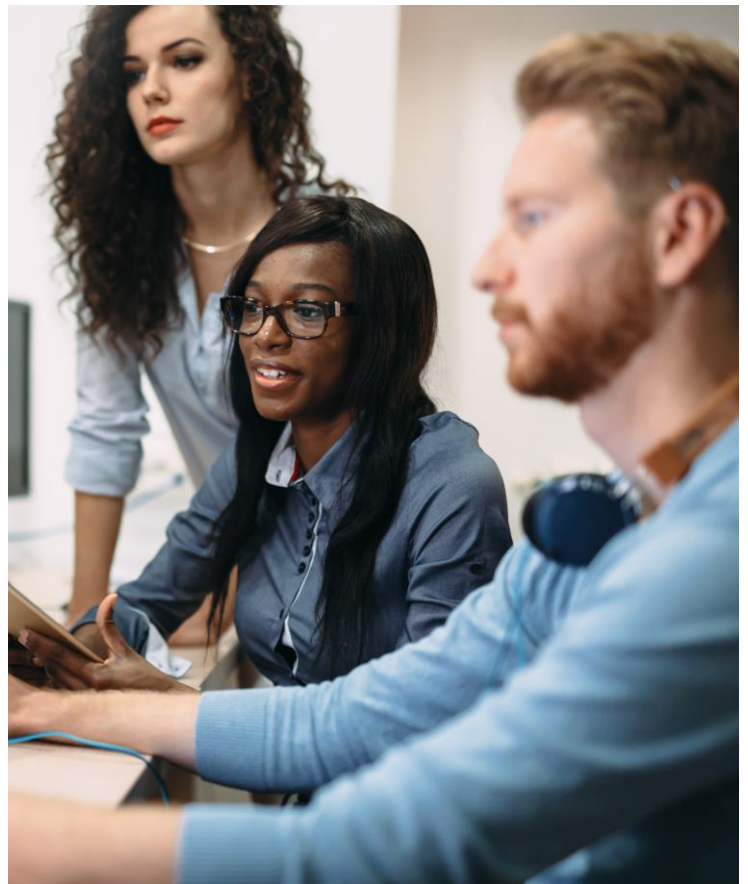
- **Avoid customizations:** Utilized modules and tools within the Oracle Cloud applications to address requirements and leveraged other UC campus agreements where possible. Capitalized on third-party software that has successfully integrated with Oracle to replace UCR-developed or customized systems, utilizing other UC campus agreements where possible.
- **Utilize delivered leading practices:** Embraced industry-leading practices built within Oracle cloud services for configuration, workflow, business processes, and insightful notifications to facilitate accountability and ease of use.
- **Integrate effectively:** Standardized, centralized, and automated system integrations across existing and new applications to interface with Oracle Cloud.

UCR collaborated with Deloitte to reduce overall program risk and leverage product knowledge and expertise in Oracle Cloud processes, incorporating leading practices in technology and data conversions. As a key driver of success, the Impact23 program engaged the campus collaboratively, focusing on system usability and user training.



"I have had many experiences with major new system implementations like this, and they are inherently challenging. However, Deloitte has been a very good partner with us through the planning and implementation process and we clearly would not have been successful without their strong level of expertise and support."

*-Gerry Bomotti, Vice Chancellor,
Planning, Budget & Administration
/ CFO / Executive Sponsor*





Focus Areas

Financials

The implementation of Oracle Fusion Cloud Financials at UCR has marked a transformative success in various financial domains. The deployment spanned across:

- **Procure to Pay:** Procurement, Accounts Payable, Supplier Management (including Supplier Portal)
- **Record to Report:** General Ledger, Fixed Assets, Cash Management
- **Project Portfolio Management:** Contracts, Grants, and Capital Projects.

This comprehensive integration replaced outdated and legacy systems such as eBuy, PeopleSoft, Vendor Request System and eAward, streamlining processes and enhancing efficiency.

Within the modules, UCR implemented workflow approvals, eliminated post audit notifications, introduced new validation business rules and new financial reports, established off-site payment disbursements, and deployed an improved Enterprise Access Control System including user access provisioning.

Enterprise Performance Management

Oracle Enterprise Performance Management (EPM) planning and budgeting cloud implementation covered financials budget process, budget execution, budget request, and workforce setup transitioning from an existing Excel-based budgeting process to a systematic, trend-based, and controlled budgeting and budget control process.

- Completed four planning configurations.
 - **Financial Budget Process:** For annual budget projections of revenue and expenses.
 - **Workforce Budget Process:** For the annual budget projections of permanent FTE and associated expenses.
 - **Budget Execution:** To manage and monitor the revenue and expense budgets by COA.
 - **Budget Request:** To request a budget allocation from either Dean/Vice Chancellor Resources or Central Budget Resources by Request Type.
- Moved from a traditional MS Excel-based budgeting process to more dynamic planning with enhanced reporting and analytics.
- Developed an online approval-based funding request mechanism for both the budget process and budget execution to automate funding allocations.
- Developed several reports to analyze the planning and budgeting data, covering staffing reports and fund summary reports among the key financial reports.
- Automated security from UCR's current access management tool to the EPM Cloud.
- Completed data automation and master data integration from Oracle GL, Workforce Distribution Page, Oracle Projects module, and 3 of UCR's boundary systems with Oracle EPM planning.

Achievements in Operational Excellence

UCR went live with Oracle Cloud Financials and EPM in July 2023, celebrating numerous post-deployment successes that underscored the positive results of Impact23.

- System-Wide Chart of Accounts. By July 1, 2023, all University of California schools were anticipated to report financial data in accordance with the system-wide or Common Chart of Accounts (CCOA). Coinciding with Deloitte's project go-live, UCR fulfilled their obligation by implementing the new CCOA, and has embraced the new UC monthly transmission and reporting requirements.
- Meticulous data conversion led to integration with multiple systems including Concur, Banner, and Quali, Oracle Budget and COA Management that effectively introduced the organizational change to both the central office and campus users.
- The seamless setup and integration of Oracle Advanced Access Controls enhanced overall system control and security.
- The incorporation of new validation business rules, financial reports, notifications, and a proprietary Enterprise Access Control System further fortified the financial infrastructure.
- The availability of purposeful reports from Day One, providing stakeholders with valuable insights and data-driven decision-making capabilities. The program provided a collection of standardized reports upon deployment, allowing users to focus on analysis and problem solving with dashboards and data visualizations that offered open access to standard datasets and legacy system archive data.

For more information,
please contact us.

Mary Preston
Managing Director
Deloitte Consulting LLP
marpreston@deloitte.com
+1 415 999 8575

Tyler McPheeters
Senior Manager
Deloitte Consulting LLP
tmcpheeters@deloitte.com
+1 312 316 4105

Angela O'Leary
Manager
Deloitte Consulting LLP
anoleary@deloitte.com
+1 612 692 7168

Connect with us!

 [**highereducation@deloitte.com**](mailto:highereducation@deloitte.com)

 [**deloitte.com/highereducation**](https://deloitte.com/highereducation)



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