

Budget Bulletin

February 11, 2021 - 4th Edition

Announcements

Oracle Planning and Budgeting Production Environment is Live!
The budget development deadline is **April 2nd**. Be aware of which system environment you are in when entering your budget! Please reference the Oracle Planning and Budgeting web page with quick links to the training and production environments: https://blink.ucsd.edu/finance/support/fis-project/oracle-planning-and-budget.html

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Resources & Support

Attend office hours!
Office Hours are held every Thursday, 10:00am-11:00am, through April 2nd. Bookmark the office hours web page for quick access to the Zoom link: https://blink.ucsd.edu/finance/support/training-events/officehours.html

Need additional training?
Contact the budget subject matter expert (SME) to see if there are additional upcoming training support sessions within your area. Campus Budget Users and SMEs

New KBAs available and more coming soon!

1. FAQ: Preparing a Budget in Oracle Planning and Budgeting
2. FAQ: Compensation Planning in Oracle Planning and Budgeting for Staff and Faculty
3. How to Restore an Employee from Snapshot Roster in EPBCS

4. How to Plan Non-Salary Expenses on a Project.Task in EPBCS Form 3.3

Want to learn more about Smartview Excel add-on for connecting and submitting budget data to the Oracle Planning and Budgeting system?
Start here by watching this short eCourse on Smart View. Office hours support sessions for Smart View functionality and use with the Oracle Planning and Budgeting system will begin on **February 18, 2021** for budget users interested in using Smart View. Smart View Office hours and the Zoom link will be posted on the office hours web page https://blink.ucsd.edu/finance/support/training-events/officehours.html

WalkMe is Coming!
The project team is implementing WalkMe to support your use of Oracle Planning and Budgeting. WalkMe will make your experience in the new system more efficient and intuitive. WalkMe is currently live in Kuali Research, Ecotime, Oracle Financials Cloud, Concur, and many other systems throughout campus.

WalkMe help is on-demand. You are in charge of when and where step-by-step guides assist you. WalkMe is not a training tool, it is a digital adoption tool. With WalkMe, you will receive direct communications from the project team, links to client support methods, access to search Knowledge Base Articles (KBAs) from your current browser, automated processes to make you work more efficient, and contextual tips.

WalkMe content will be deployed as needed. New content is developed based on your questions and feedback about the system.

To use WalkMe, verify that you have the WalkMe extension installed, the extension works for all systems that currently use WalkMe. You only need to download the extension once. There is no configuration required, besides installing the extension. After installation, WalkMe content will display where available with no further action needed.

If you have any questions about WalkMe, reach out to walkme@ucsd.edu

About the Budget Bulletin

The Budget Bulletin is delivered to budget preparers and Financial Officers to share information and important updates related to Oracle Planning & Budgeting in prepartion for go-live.

For knowledge base articles or to submit a question to the Campus Budget Office, please visit the Budget and Planning section of the UC San Diego Services & Support portal.

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial information system and support departments' success in managing their fiscal responsibilities.

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