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/oracle-
planning-and-budget.html

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 Course 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 preparation for go-live.

For knowledge base articles or to submit a question to the Campus Budget Office, please visit the Budget and
Financing 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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