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February 1, 2022

56th Edition

Finance Help Line Officially Launches Today!
We are excited to announce the official launch of the UC San Diego Finance Help Line! The support line is staffed by knowledgeable representatives, providing simplified and improved service by expanding their service support framework.

- **Hours of Operation:**
  - Tuesdays - Thursdays, 10:00am - 12:00pm & 1:00pm - 3:00pm
- **Topics Covered:**
  - Chart of Accounts, General Ledger, and Accounting
  - Sponsored Projects Financial Management
  - General Projects and Cost Transfers
  - Receivables, PPM Billing, and Other Financial Operations-related

        - e.g. Equipment Asset Management, Merchant Services, or UC San Diego Bank Information
    - Procure to Pay, Logistics, or Travel-related

Please refer to the Finance Help Line Campus Notice and the Finance Help Line Blink page for additional information.

We would like to thank our agents and volunteers for their time and efforts during the soft launch period of the Finance Help Line. The testing and feedback provided from January 11 to January 27, 2022 allowed us to refine and prepare for the official launch.

We thank you for your continued support!

Default Day is Almost Here!
A UCPath Alert was announced on January 25, 2022 with all of the Default Day details. Your support and assistance are an essential component to achieving the goal of reducing our default project balances and reducing unnecessary cost transfers. The first Default Day will be February 11. Default Day, which will occur every second Friday of the month, will be focused on identifying any issues that may result in UCPath expenses posting to your department's FinU default project.

On each Default Day, the Payroll team will send an email communication with a **Funding Issues Report** attachment or link with specific steps on how to make any necessary adjustments to projects or UCPath funding entries to prevent future payroll from posting to the FinU default project. When you receive the report, it will be extremely important to review and correct the funding entries before the UCPath deadlines.

Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel.

Campus Budget Office: Office Hours

Thursdays, 10:00am - 11:00am
Starting February 3 until March 31, the Campus Budget Office will be hosting Office Hours every Thursday from 10:00am - 11:00am to support budget preparers throughout the planning process. This week's Office Hours will have an open Q&A.

Fund Management Office Hours

Thursdays, 11:00am - 12:00pm
This Thursday, Deston Halverson, Director of Sponsored Projects Finance, will answer all of your questions about ECERTs. Effort certifications for FY21 JUL-DEC, FY21 JAN-JUNE, FY22 JUL-DEC reporting periods must be completed by April 30, 2021.

Oracle: Buying and Paying for PO Requisitioners

Thursday, February 3, 2022 @ 9:00am - 11:00am
This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, closing POs, processing nonPO payments, and checking invoice status. This course will be especially valuable for individuals responsible for departmental purchases who want to further their understanding of buying on campus.

Oracle: Buying and Paying for Financial Unit Approvers

Thursday, February 10, 2022 @ 9:00am - 11:00am
This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as reviewing for and populating POETAF information during the ordering process, approving requisitions and invoices, revising orders, and checking PO invoice status. This course will be especially valuable for individuals responsible for those responsible for approving requisitions and invoices on behalf of their financial unit.

University Procurement Card Program

Tuesday, February 15, 2022 @ 1:30pm - 4:00pm
Current and prospective cardholders will learn about updates to the card program, common uses, and the Concur processes for both Procurement Card request and transaction reconciliation.

Note that this is not an introductory course. Participants must first complete the associated eCourse available through the UC Learning Center.

In Case You Missed it!

Hot Topics: Navigating IPPS Resources

Our presenters reviewed the various resources available for navigating Oracle Procurement & Payables and Concur Travel & Expense, and how to best interact with them. This is a great Hot Topics to view if you are new to UC San Diego/your role or would like a refresher on the IPPS resources.

Check out past Hot Topics sessions at any time on Blink: Recorded Webinars.

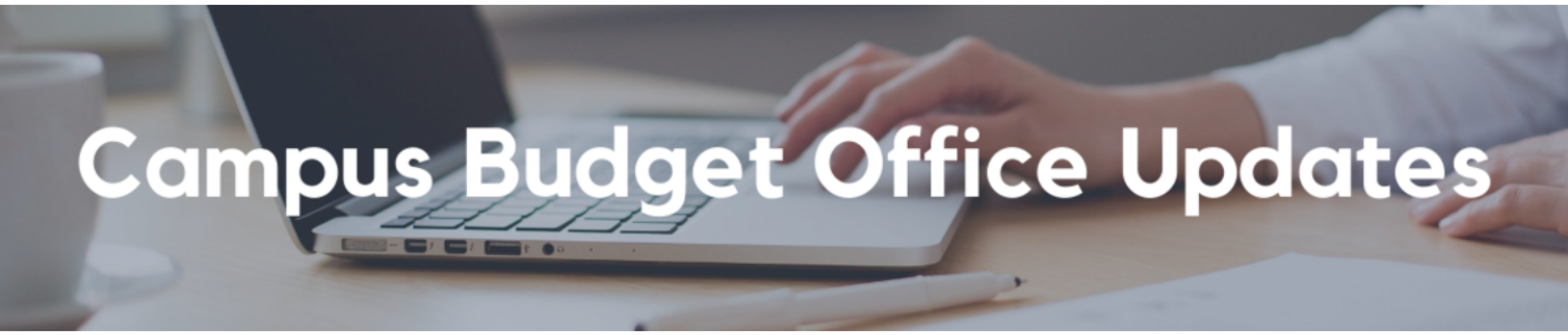
Click to access the Event Calendar on Blink, which showcases a consolidated view of Office Hours, Instructor-Led Training sessions, and Hot Topics.
Be sure to try out the different calendar views in the upper right corner!

You Asked, We Delivered!

The following enhancements have been made to the **Project Information** dashboard:

- Project Status, Project End Date, and Task End Date columns have been added to the **Project COA Lookup** report. Task End Dates in the past appear in red and a new prompt allows you to filter based on Task End Date.
- A new **Award Project Task Personnel** report identifies the people in all roles recommended for use in the KBA How to Understand and Update Oracle (OFC) Project Portfolio Management (PPM) Project Personnel.

These enhancements were developed in collaboration with staff from the Department of Medicine, Jacobs School of Engineering, and members of the Budget and Finance User Group.



Oracle Planning and Budgeting Tool (EPBCS) Open for FY23 Budget Entry

The Production environment was released to budget preparers as of Thursday, January 27 and

will remain open until April 1. Please check with your Vice Chancellor area for verification that you are responsible for entering the budget for your area.

Missed the **What's New in EPBCS Webinar** on January 25? Watch the recording posted here.

To support budget preparers throughout the planning process, the Campus Budget Office will be hosting **Office Hours** every **Thursday from 10:00am - 11:00am**, from **February 3 to March 31**. Join here. Additional details and training resources are available in the Budget and Planning Community of Practice Channel.

Creating a Requisition from a Multi-Line Quote

The newest Oracle Procurement KBA focuses on how to most efficiently create a requisition from a multi-line quote to reduce time spent compiling the requisition as well as payment delays due to invoice holds. A full list of punchout suppliers offering quote retrieval is provided in the KBA, and instructions are provided for those quotes which need to be populated via request form instead of retrieved via punchout.

Each Tuesday, the Weekly Digest provides important updates related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense.
Our goal is to deliver timely information that matters to you.

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