Creating a Requisition from a Multi-Line Quote

To support budget preparers throughout the planning process, the Campus Budget Office will be making Oracle Planning and Budgeting Tool (EPBCS) Open for FY23 Budget Entry available for Spring

You Asked, We Delivered!

These enhancements were developed in collaboration with staff from the Department of Accounting & Administration, with input from the budget preparers in the Office of the President, the Office of Student Affairs, and members of the Budget and Finance User Group. The following enhancements have been made to the Campus Budget Office's Requisition and Budget systems:

- Ability to request multiple items on the same requisition
- Improved project, task, and cost line item identification
- Enhanced project budgeting and reconciliation
- Streamlined process for reconciling project balances
- Reduced time spent compiling the requisition and payment delays

We are looking forward to seeing how these enhancements are utilized by our budget preparers to support the planning and budgeting process.

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

Oracle Planning and Budgeting Tool (EPBCS) is being made available for FY23 Budget Entry. The Campus Budget Office is excited to announce the following enhancements:

- Improved project budgeting and reconciliation
- Streamlined process for reconciling project balances
- Reduced time spent compiling the requisition and payment delays

We are looking forward to seeing how these enhancements are utilized by our budget preparers to support the planning and budgeting process.

In Case You Missed it!

Oracle: Buying and Paying for Financial Unit Approvers

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 websites, and creating requisitions and purchase orders. The course is designed to help users become more efficient in their purchasing tasks and reduce the time spent on procurement-related activities.

Current and prospective cardholders will learn about updates to the card program, common uses, and instructional steps for Procurement Card request and transaction reconciliation. This course is ideal for anyone involved in the purchasing process and will provide a comprehensive understanding of the card process.

The following courses are offered:

- Tuesday, February 15, 2022 @ 1:30pm - 4:00pm
  - Oracle: Buying and Paying for PO Requisitioners
- Thursday, February 3, 2022 @ 9:00am - 11:00am
  - Oracle: Buying and Paying for Financial Unit Approvers
- Thursday, February 10, 2022 @ 9:00am - 11:00am
  - Oracle: Buying and Paying for PO Payables

Finance Help Line Officially Launches Today!

We’re excited to announce the official launch of the Finance Help Line. The Finance Help Line is designed to assist users with navigating the UCPath system and resolving issues and questions about financial processes and procedures. The Finance Help Line will be available from 8:00am to 5:00pm, Monday through Friday, and will provide assistance with a wide range of topics, including:

- Budgeting and Requisitioning
- Payables
- Travel and Expense
- Sponsored Projects
- Oracle Procurement and Payables
- Account Receivables
- Receivables
- PPM Billing
- Other Financial Operations

The Finance Help Line is an essential resource for anyone involved in financial processes at UC San Diego. Please feel free to contact us with any questions or concerns you may have.

Campus Budget Office: Office Hours

The Campus Budget Office is offering 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.

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Finance Help Line Campus Notice

On each Default Day, the Payroll team will send an email communication with a link to the Default Project Details Report. This report identifies the people in all roles responsible for the project balances and reducing unnecessary cost transfers. The first Default Day will be February 1, 2022.

The Default Project Details Report is a tool designed to help users identify and resolve issues related to project balances and cost transfers. The report provides a consolidated view of all active projects with balances, and highlights the project status, budget, and cost line items associated with each project.

The report identifies the people in all roles responsible for the project balances and reducing unnecessary cost transfers. This week's Default Day email will include a link to the report. Please ensure that you have added the Finance Help Line to your contact list to receive this email.

Please refer to the Project Information report. Task End Dates in the past appear in red and a new prompt has been added asking users to resolve any issues that may exist.

On January 25, 2022, an A UCPath Alert was announced with all of the Default Day details. Your support and assistance are an essential component to achieving the goal of reducing our default rates by completing the Default Project Details Report. Please take the time to review and resolve any issues that may exist.

We thank you for your continued support!

February 1, 2022 allowed us to refine and prepare for the official launch. Additional details and training resources are available in the Finance Help Line.

Tips & Tricks

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February 11, 2022