Budget & Finance Weekly Digest



March 14, 2023 | 112th Edition

Announcements



Oracle Scheduled Maintenance 03/17/2023
Oracle production environment will be down for maintenance from **7:00 PM Friday 03/17/2023** through **7:00 PM Sunday 03/19/2023**.

Updated Oracle ADF Desktop Integration Excel Add-On Available 03/20/2023
Do you use excel to upload transactions in Oracle? If so, a new version of the integration add-in will be available beginning Monday March 20, 2023.

PADUA 2.3 Release Coming Soon
The Project and Award Data Update Application (PADUA) will have new features released this month. Release 2.3 will include updates to Award Personnel and request updates to sponsored projects (with final approval through SPF). It will also allow for the ability to update General Project start dates and update the project status (closed/open). Recharge projects and tasks requests will now have workflow to CP&A. These updates are scheduled to be released **March 17, 2023**.

Daily Cost Transfer Emails Were Delayed
It was recently identified that the daily cost transfer emails that are sent to PIs and PMs were not sent between Jan 13 through Mar 7. These emails were resent 3/10/23, but had the current date instead of the original date.

New Emailed Reports Have Been Delayed
The new reports announced in the 2/28/23 Digest were delayed. There were some technical difficulties and subsequently went live on 3/10/23 - 3/14/23.

Oracle Project Cost Adjustment Workflow Notification Updates Coming 03/17/2023
In August 2022, the Oracle Workflow Notifications were updated to include more detailed information to allow you to take advantage of the ability to approve pending transactions via email. We're happy to announce that Project Cost Adjustments (Cost Transfers) has also been updated. This is an additional enhancement from the Oracle updates to Project Cost Notifications in late December 2022. Upcoming release date of March 17, 2023.



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

Fund Management Office Hours
Every Thursday @ 11:00am - 12:00pm
This week Heather Vinograd will be coming back with updates on Concur charge-offs. Get your questions answered in an information-packed session. Don't miss it!

UC San Diego Travel: Before You Go
Thursday, March 16 @ 9:00am - 11:00am
The course will include an in-depth explanation of topics covered in the Concur Travel and Expense eCourse. This course will be especially valuable for employees who travel or book business travel and want to further their understanding of travel preauthorization and UC San Diego's instance of Concur Travel booking tool. Intended for travel arrangers, delegates, travelers, and financial managers who are familiar with Travel Policy G-28 and would like to learn about more advanced Concur Travel terminology and concepts.

Topics Covered:

- Review the process to request travel preauthorization via Concur Request.
- Be able to request a new University Travel & Entertainment Card.
- Learn how to book travel via Concur Travel.

UC San Diego Travel: Reporting Expenses
Thursday, March 16 @ 1:00pm - 3:00pm
The course provides an overview of UC San Diego travel policy and procedure, including summarized guidelines, resources, and information about online tools. In this course, you will learn about Concur processes for prepaying travel and claiming expenses after the business trip occurs in accordance to Travel Policy G-28. Intended for: Those involved in the process of trip reconciliation for business travel at UC San Diego, including travelers, preparers (Concur Delegates) and approvers.

Topics Covered:

- Arranging for prepayment of fees, such as registration.
- Making deposits, such as for hotels.
- Reporting expenses.
- Claiming traveler reimbursement.

Reporting Workshop: Dashboard of the Week Series

Monday, March 20 @ 11:00am - 12:00pm

Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include an interactive report demo, discussion of what questions the report can answer, opportunities to ask questions and walk through your use cases, and hear how others are using the dashboard or report. Next week's session will feature the Research Administration Activity Dashboard.

Oracle: Buying and Paying for Goods & Services

Thursday, March 23 @ 9:00am - 11:00am

This course will be especially valuable for employees who want to further their understanding of buying on campus or those who will be approving requisitions or invoices. Instruction will involve an introduction to Oracle Procurement as well as hands-on practice and feedback to gain valuable, practical experience. Intended for fiscal administrators, fund managers and financial managers who are familiar with sponsored award management on campus and would like to learn about more advanced buying terminology and concepts.

Topics Covered

- Shopping for and purchasing goods and services
- Searching across UC San Diego requisitions and POs
- Approving invoices and requisitions
- Closing POs
- Processing NonPO payments through Oracle Procurement
- Checking PO and NonPO invoice status
- Receiving credits through refund checks

Hot Topics: **PaymentWorks Webinar**

Monday, April 3 @ 11:00am - 12:00pm

This is a great opportunity to hear more about our new Payee Management system which will be replacing Payment Compass in April.

Reporting 1:1 Sessions

Sign up for a 1:1 Zoom session to meet with a member of the BI & Financial Reporting team who can answer your specific questions about financial reporting and dashboards/panoramas in the Business Analytics Hub (BAH).

Have Finance-related questions?
Call the UC San Diego Finance Help Line.

(858) 246-4237 **Tuesdays - Thursdays | 10:00am - 12:00pm & 1:00pm - 3:00pm**

Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer Finance-related questions.

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!



New Dashboard Release: Cost Share Reconciliation
The new Cost Share Reconciliation Dashboard is now available. This dashboard has three tabs for PPM summary, GL summary, and Misposted transactions. The Cost Share Reconciliation Dashboard is accessible from the Business Analytics Hub. For more information about the dashboard, visit the Cost Share Reconciliation Dashboard Blink page and join the Fund Management office hours next week, March 23, 2023 to see a demo.

New Enhancement Release: Sponsored AR Aging
The following changes are now live on the Sponsored AR Aging report:

- Multi-select for Financial Units, Award Type, and project class code
- New prompt for Line of Credit

New Enhancement Release: Incoming Payments Report
New fields have been added on the Incoming Payments report for receipt type and creation method.

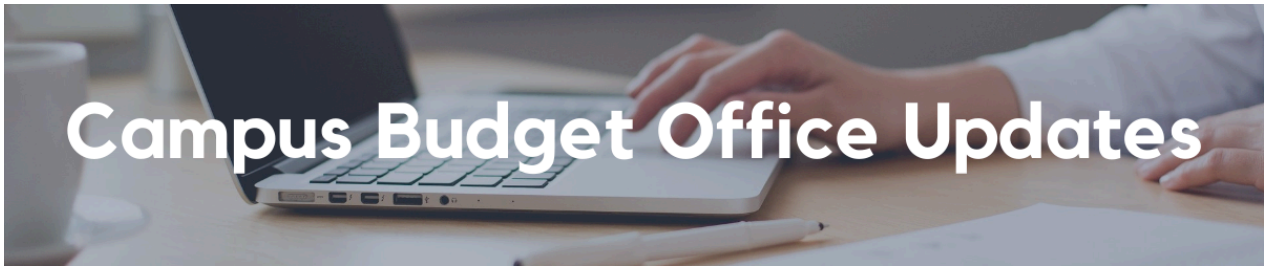
New Enhancement Release: Cost Transfer Dashboard
The following changes are now live on the Cost Transfer Dashboard:

- A new page on the project cost transfer panorama for “other adjustment status”
- Added a column for “Approved by”
- Cost transfer workflow report is now searchable by the financial unit with a multi-select option.

Special thank you to the following individuals for submitting the requests that led to this week’s enhancements: Ariel Tam, Ryan Antonio, Marissa Prough, Vanessa Sanchez, & Cathy Hyunh.

New! Updated Current and Future Report Development Blink Page

The Current and Future Report Development Blink page has been updated to highlight both new reports and dashboards, as well as enhancements to existing reports and dashboards. A Release Notes section has also been added, which will highlight updates that are posted here in the Digest.



The 2023-24 Budget Entry Deadline is March 30th

Access the EPBCS production environment to complete your FY24 operating budget at https://planning-ekgs.pbcs.us2.oraclecloud.com/HyperionPlanning

If you missed our Oracle Budget training sessions, the recordings and slide decks from those sessions are now available.

Bring Your Capital Projects Questions to This Week's Office Hours

Thursday @ 10:00am – 11:00am

Holly-Ann Paiva will attend office hours this week to answer any questions you might have on capital projects planning in EPBCS. There will also be time to answer general budget and EPBCS questions, so all budget users should plan to attend this week's CBO Office Hours.

Take our Self-Paced Training Course on UCLC

Oracle Budget: Budgeting at UCSD is a new self-paced training course that covers the use of both the web application and Smart View to build your budget in EPBCS.

Join our Community of Practice (COP)

The Budget and Planning COP channel audience includes Budget Preparers identified by each Vice Chancellor Office with responsibility to create Financial Unit budgets within the Oracle Planning and Budgeting system (EPBCS).

Need EPBCS Support? Use the Services and Support Ticket Portal

For technical issues or questions about any of the Task Lists, please submit a ticket via the Services and Support ticket portal. Just select **Budget & Planning > Oracle Planning & Budgeting (EPBCS)**.



Local Hotel Program Reminder

Are you missing a charge from one of our local partner hotels? Please submit the final hotel receipt (folio) to Services & Support using the following categories and we will research it for you.



The Support Framework: Your Guide to Finding Help

Learning all there is to know about budget & finance can feel daunting.



The **Support Framework** is designed to help the Budget & Finance community, including faculty or staff with financial responsibilities, identify their resources based on the following questions:

- What can I do **on my own**?
- Where can I **get help**?
- Who can **help escalate**?
- How do I **suggest enhancements**?

Bookmark or download a copy for quick links to various resources available to you.

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.

Not sure where to find answers? Get started using our Support Framework.

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