Budget & Finance Weekly Digest



March 21, 2023 | 113th Edition

Announcements



Search for Purchase Orders by Project

You now have the ability to search for Purchase Orders by project, and optionally task number, in the Oracle Purchase Orders module. For instructions on how to do so, please review our new KBA.

Coming Soon - Effort Reporting in ECERT

We are in the final stages of testing ECERT (Electronic Certification of Effort and Reporting Tool). Once complete we will notify the campus of the release of effort report forms in ECERT. Specific dates will be finalized soon and announced. We will be certifying FY21 and FY22 and will have a due date of 4 months from the time of release. We will be offering training sessions to support those who need a refresher or who have not gone through the process in the past.

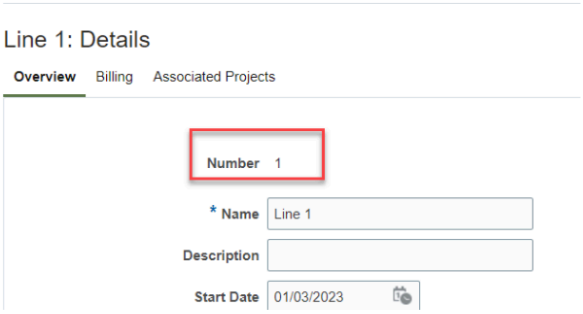
Updated Oracle ADF Desktop Integration Excel Add-On Now Available

Do you use Excel to upload transactions in Oracle? If so, a new version of the integration add-in is now available for you to download:

1. On any OFC page, click on the **Navigator** button on top left.
2. In **Tools**, select **Download Desktop Integration Installer** and click on **Save File.**
3. Go to your **Downloads** folder and run the file by double clicking on **adfdi-excel-addin-installer-current-user**, follow the instructions in the prompt.
4. Open a new **Excel** spreadsheet, **File > Options > Add-ins** and confirm **ADF Desktop Integration > Oracle ADF Desktop Integration Add-in for Excel** is listed.
5. If the add-on is not listed, restart your computer.

Oracle Project Portfolio Management (PPM) and Contract Issues Resolved

- **Multi-Cost Transfer Count:** When selecting multiple costs to transfer, the row count previously only reflected the selected rows on the page, as opposed to the total count. This is now resolved, and the count reflects the total number of transactions being transferred.
- **Contract Line Number Validation**: To prevent the use of alpha or special characters, the Contract Line Number field on the Contract Lines tab will no longer be editable for General Contracts. This ensures that Generate Invoices will run smoothly and without error.



Oracle PPM Cost Transaction Processing Status Partially Fixed: When users navigate to Projects and Awards > Costs to view the initial Transaction Processing Status window, the Exceptions tab under the Adjustments header was not initially loading. The only way to load Exceptions was to switch to a different header tab (Borrowed and Lent or Burdening) and switch back to Adjustments to "force" a load. While Oracle resolved this issue with the Exceptions tab, the **Pending tab is now experiencing the same behavior**. We are working with Oracle to resolve this issue.

PADUA 2.3 Release Postponed to 3/24/23

The Project and Award Data Update Application (PADUA) has new features that will be 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. This update was scheduled for March 17, but has been postponed to be released **March 24, 2023**.

Oracle Project Cost Adjustment Workflow Notification Updates Are Delayed

The Oracle Cost Adjustment Workflow Notifications updates have been delayed. The updates will provide more detailed information to facilitate approving pending transactions via email. Updates and more information will be shared in the future.

Is Southwest's Wanna Get Away+ Fare an Upgrade?

Southwest's new fare tiers include Wanna Get Away+ (WGA+), which includes benefits such as:

- Transferable flight credits, which will allow Southwest Rapid Rewards Members to transfer their airline credits to another Rapid Rewards Member. For bookings made through SWABIZ (Southwest's Business channel), transfers can only be made between UC campus travelers.
- Same-day confirmed changes and same-day standby, which will give travelers the flexibility to change their flight on the same day as their original flight, if there are seats available, without additional airline charges.

For UC travelers, the advantages of WGA+ is in the transferability of the credits and the flexibility for changes (especially given anticipated schedule changes in the coming months).

Is this fare class considered an upgrade? While G28 Travel Policy asks travelers to book lowest logical fare, the regular “Wanna Get Away” fare has become more like a basic or saver ticket that has very few protections for the traveler. Wanna Get Away+ is a logical choice for our travelers and is not considered an upgrade.

Requisition Approval Email Error

Emails sent to the approver when a requisition requires approval are not displaying all relevant information. Instead, these notifications are often simply displaying errors. You can still view all relevant requisition information by logging into Oracle and accessing the approval from your worklist. To access the approval:

1. Login to ofc.ucsd.edu.
2. Click the bell icon at the top right.
3. Search for the requisition.
4. Click on the requisition.

We apologize for the inconvenience, and Oracle is actively working to resolve the issue.



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

Oracle: Buying and Paying for PO Requisitioners

Thursday, March 23 @ 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.

Fund Management Office Hours

Every Thursday @ 11:00am - 12:00pm

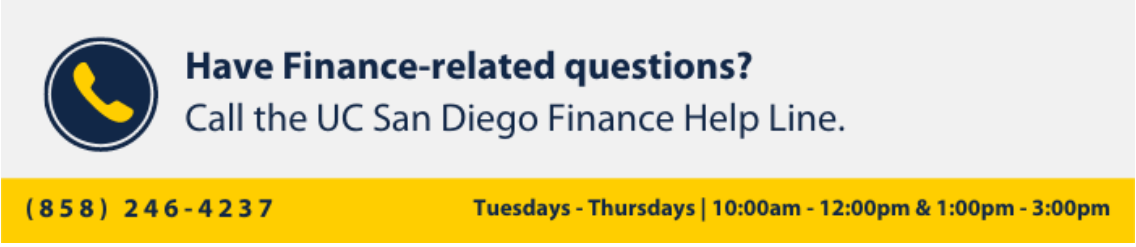
At this week's office hours we will walk through how to use the newly released **cost share reconciliation dashboard.** This dashboard has three tabs for PPM summary, GL summary, and misposted transactions. Come get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don’t miss it!

Reporting Workshop: Dashboard of the Week Series

Monday, March 27 @ 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 Current Awards & Pending Proposals.

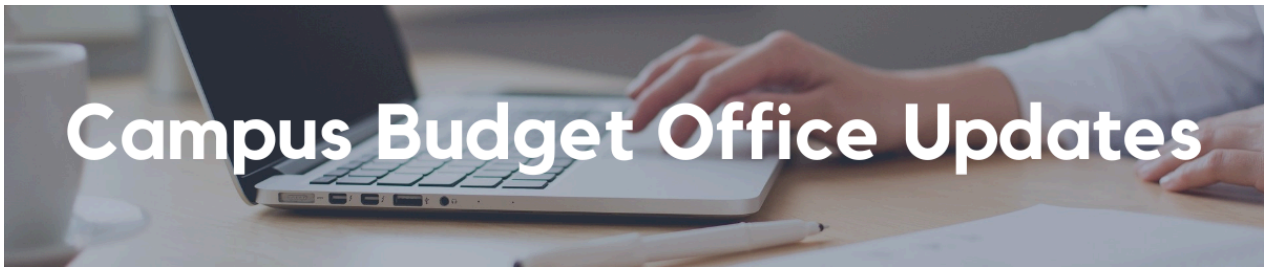
Hot Topics: Payee Management
Monday, April 3 @ 11:00am - 12:00pm
Join IPPS for its next session of Hot Topics to learn about payee management, including how to select which payees to use, how to best use PaymentWorks, and how to engage with small and diverse businesses.

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).



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!



Two Weeks Until the 2023-24 Budget Entry Deadline
Access to the Oracle Planning and Budgeting system (EPBCS) production environment closes on March 30th. Before the tool closes, make sure to:

- Ensure staff and faculty rosters are completed and accurate
- Ensure you complete the core recurring budget to meet the Target
- Complete one time, other unrestricted and gift planning as necessary

Complete your FY24 operating budget at:
https://planning-ekgs.pbcs.us2.oraclecloud.com/HyperionPlanning

CBO Office Hours

Every Thursday @ 10:00am – 11:00am

Join us for the last 2 sessions of Office Hours!

Bring your budget and EPBCS questions to CBO Office Hours every Thursday through March 30th. We will address proposed topics each week but also invite you to make suggestions in the Budget and Planning Community of Practice.

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.

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

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)**.

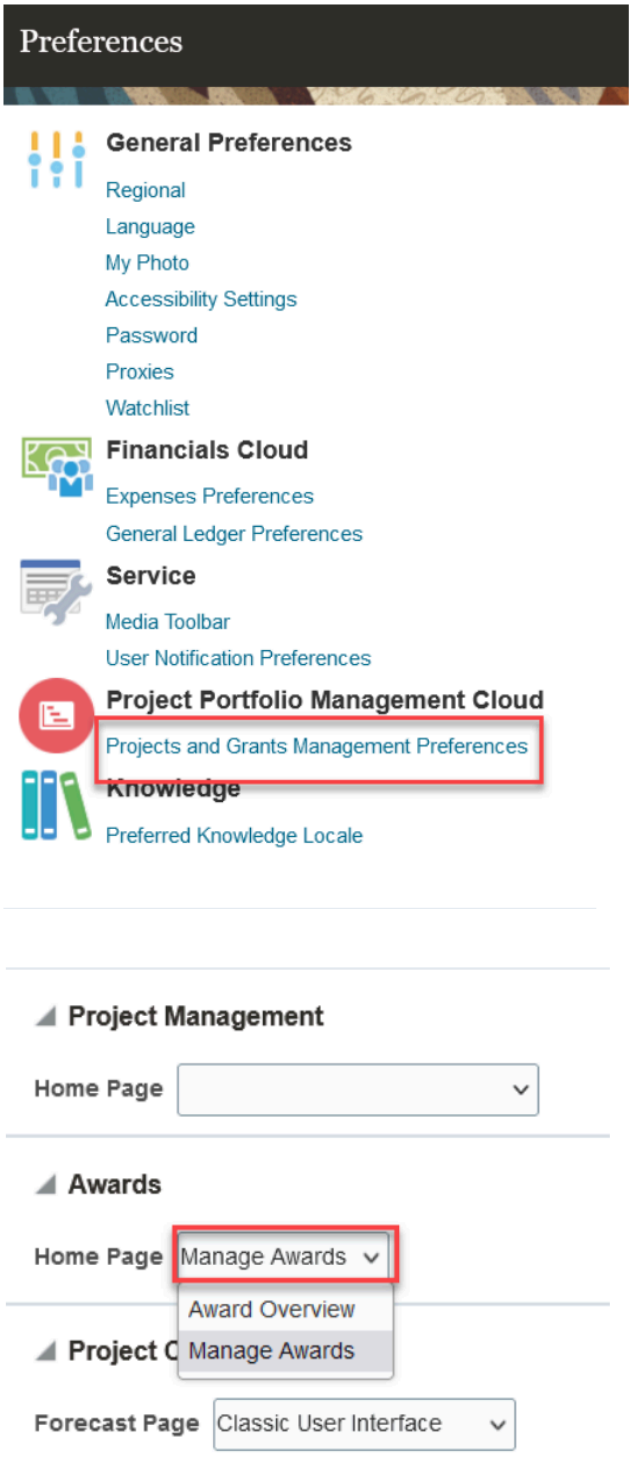


Oracle Manage Awards Landing Page Reminder Tip

You can change your preference settings to directly display Manage Awards (search and list view) instead of the Award Overview (graphical view) page.

To make the change:

1. Click on your initials in the upper right corner
2. Navigate to Preferences
3. Navigate to Projects and Grants Management Preferences
4. Change the Award Homepage dropdown option to Manage Awards
5. Save and Close



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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UC San Diego

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