Budget & Finance Weekly Digest



February 27th, 2024 | 160th Edition

Announcements

(Coming Soon) New Oracle Self-Paced, Guided Training Series
Get ready to elevate your Oracle knowledge and skills with a series of interactive courses focused on Oracle Financials Cloud topics!

The Oracle Financials Cloud Training Series is aimed at empowering staff across UC San Diego with accessible, self-paced training modules available on demand in the UC Learning Center.

The first course in the series, ***Oracle Foundations***, will launch on March 12th and includes four learning modules:

- Welcome: OFC and reporting navigation basics
- General Ledger and Subledgers: How OFC is structured and information flow
- Chart of Accounts and Chartstrings: Basics of transacting in the General Ledger
- Intro to Project Portfolio Management (PPM): POET(AF) and project attributes

More about the Training Series is coming soon, including information on future course topics and training requirements next fiscal year. Stay tuned!

(In-progress) Financial Accounting Program - Information Session
The UC San Diego Financial Accounting Program is a complementary professional development opportunity being offered to help you become more effective in your role. This program is currently offered at **no cost** to eligible career employees through the end of the fiscal year (Spring 2024)!

We invite you to hear more by registering **here** and attending an upcoming Information Session this **Thursday, February 29, 2024, from 1:00 PM to 2:00 PM**. Please share this information with your teams, colleagues, and anyone who you think would be interested in participating in the full program or Financial Accounting for Non-Accountants (FAFNA) as a standalone course.

We appreciate the partnership with the UC San Diego Division of Extended Studies and the support from supervisors across campus and health sciences.

(New) Oracle Guided Learning (OGL) Successfully Launched!

We're thrilled by the positive response we received on our welcome tutorial and walk-through guides. Your input is invaluable to us as we continue to refine and enhance our offerings. In response to your helpful feedback, we've made a significant adjustment by disabling autoloaded guides. This aims to ensure a smooth user experience, and we are committed to reevaluating the autoload feature and conditional settings to prevent any potential issues before reintroducing it.

Keep the feedback coming – it's what drives us to deliver excellence in guided learning. Our goal is to ensure a seamless and user-centric experience every step of the way.

Join us this Wednesday, February 28, at 10:00 AM via Zoom for an exclusive Office Hour session dedicated to sharing best practices and Q&A related to Oracle Guided Learning. Thank you for your ongoing support and collaboration!

Training Update from our UCPath Partners

Leap into new UCPath training! The new UCPath CORE Training launches **this Thursday, February 29, 2024**. The newly redesigned training will replace our existing UCPath Bootcamp and UCPath Funding Fundamentals training courses, which will be available to complete until the launch of the new training on February 29, 2024.

For any questions or feedback regarding the new UCPath CORE Training, please email ucpathproject@ucsd.edu to automatically create a ticket in the Employee Center.

For questions regarding the LMS or UC Learning Center, please email lms-support@ucsd.edu to automatically create a ticket in the Employee Center.

Federal Grant Micropurchase Threshold Increase

Integrated Procure-to-Pay Solutions (IPPS) is pleased to announce that, effective January 1, 2024, the Federal Grant micropurchase threshold has increased from $10,000 to $50,000. This adjustment aims to alleviate some administrative commitment and streamline processes for departments across the University. Under this new threshold, while buyers will continue to review orders of $10,000 and above for general compliance requirements, Sole Source and Price Reasonableness documentation will not be required for orders funded by Federal grants until the order amount reaches $50,000.

We believe this adjustment will significantly benefit departments, allowing them to allocate their time and resources more efficiently. In our estimation, this change will save departments approximately an hour of processing time on each Federal grant order under $50,000.

If you have any questions or need further clarification, please do not hesitate to contact the IPPS Strategic Procurement team via Services & Support.

BI & Financial Reporting

New Report: Contract Overview

This new report provides a variety of non-financial data for non-sponsored contracts. It answers questions like:

- What active contracts does my department hold?
- Which contracts are expiring soon?
- What project and task are contracts associated with?

Campus Budget Office Updates

New Training Available on 3/21: Smart View Excel Add-In for EPBCS Reporting!
Discover the power of on-demand access to EPBCS Budget Data in our upcoming virtual instructor-led course on Thursday, March 21st from 10am-12pm. Learn how to utilize the Smart View Excel add-in to:

- Create custom ad hoc reports
- Slice and dice large pulls of data efficiently

This advanced course assumes the user has a basic level of familiarity with Smart View and is ideal for budget staff overseeing multiple financial units with a need for advanced reporting capabilities beyond standard forms and reports.

Note: This course will not cover data submission via pre-built forms or Oracle Financials Cloud queries.

Don't miss out on this opportunity to enhance your data analysis skills**! Register today!**

Two new KBA's published to support the FY25 Planning Process:

- How to Run the Target Budget Review Form in the Oracle Planning and Budgeting Tool (EPBCS)
- How to Run the PID Research Dashboard in the Oracle Planning and Budgeting Tool (EPBCS)

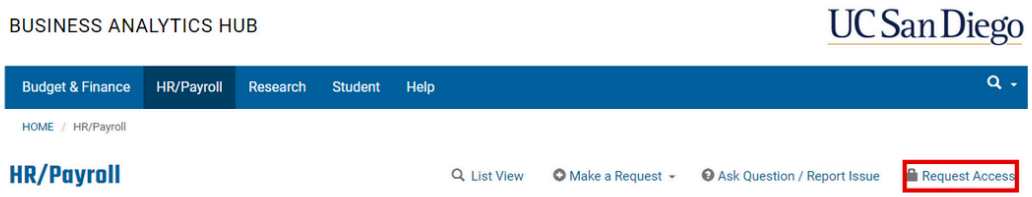
EPBCS Support Office Hours Now Available Every Thursday 11am - 12pm Via Zoom
Join us for weekly office hours if you have questions about budgeting in EPBCS.
Zoom: https://ucsd.zoom.us/j/91798780724

Tips & Tricks

Cognos and Oracle Tips & Tricks

To get access to reports available on the Business Analytics Hub (bah.ucsd.edu), go to the page that houses the report and click on the "Request Access" button, which is located in the upper right corner. You'll be redirected to a form that you can fill in for yourself or on behalf of someone else.

Depending on the group that owns the report, you'll need to request access from a different page on BAH (Budget & Finance, HR/Payroll, etc.). For example, if you need access to the DOPE report, you'll click on the "Request Access" button from the HR/Payroll page on BAH.



Training & Support

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

Contract and Invoice Creation Training

Wednesday, February 28 @ 10 a.m.-11 a.m.

Ask questions and receive guidance on the PPM contract and invoice creation process every last Wednesday of the mid-quarter on Zoom 10 a.m. - 11 a.m.

For departments requiring training between the designated courses, we offer one-on-one training sessions with a member of our team who can answer questions about the process. Sign up for a PPM Contract and Invoice Process Session directly on Calendly for teams of 3 or more personnel.

Internal Control & Accounting (ICA) Office Hours

Wednesday, February 28, 2024 @1:00pm - 2:00pm (last Wednesday of the month)

Join us and ask questions related to Payroll reconciliation, Intercampus Recharges, ITFs, General Ledger, Fixed Assets and more in an open forum discussion.

ECERT Effort Reporting Office Hours

Every Wednesday @ 2:30pm - 3:30pm

Come get your questions answered, system access setups, or helpful hints on the effort report certification process.

Fund Management Office Hours

Every Thursday 11:00am - 12:00pm

Come get your questions answered and solidify your understanding during this information-packed session. Don’t miss it!

IPPS Office Hours

IPPS holds **weekly** Office Hours to help with all of your questions related to Procurement, Accounts Payable, Travel and Entertainment, Procurement Card and Tax & Account/Supplier Setup. This is our schedule:

- **Procure-to-Pay, Travel & Entertainment, Tax & Accounting/Supplier Setup**
  Mondays 1-2:00 p.m., Wednesdays and Fridays 9-10:00 a.m.
- **Procurement Card**
  Wednesdays 9-10:00 a.m.

ICA 1:1 Sessions

Sign up for 1:1 zoom session with ICA team members

- ***Payroll Financial Management team*** 1:1 sessions have moved from UCPath to ICA. Register here for help with Salary Cost Transfers, Direct Retros, Payroll Reconciliations, UCPath Funding Transactions, Composite Benefit Rates (CBR), General Liability (GAEL) & Vacation Leave Assessment (VLA).
- ***General Ledger Financial Management team***
  Register here for help with General Ledger, Capital/ Fixed Assets, Detail Code setup, ITFs, Internal Controls, Oracle Role questions and more.

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).

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!

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.



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**

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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