Budget & Finance Weekly Digest



March 19th, 2024 | 163rd Edition

Announcements

Check out the Oracle Foundations Course!
The first course in the Finance Training Program, Oracle Foundations, is now available in the UC Learning Center: https://go.ucsd.edu/4a3xkgQ!

The course's four learning modules, listed below, focus on core concepts and navigation within Oracle Financials Cloud and are available for all UC San Diego staff and faculty to complete.

- 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

The Finance Training Program aims to establish a foundation of knowledge, so those with finance-related responsibilities can achieve long-term success. More information about the Finance Training Program, including a roadmap of future courses, is available on the **Budget & Finance Training Blink page**.

Finally Close POs with a Google Form
IPPS is introducing a streamlined method of closing Purchase Orders (POs) through a Google form. With this new process, you will be able to perform a mass close of POs without having to open a case in Services & Support. The POs submitted through the Google Form will be reviewed every Friday at noon and should close the following Monday.

The official launch of the **Finally Close Request** Google form is scheduled for **March 25th, 2024**, although the pilot version is available now if you would like to test it! IPPS is committed to ongoing enhancements and will implement changes to the form as necessary.

New Blink Resource: Commonly Used Expenditure Types
Integrated Procure-to-Pay Solutions (IPPS) is excited to announce a new Blink page showcasing the most frequently used expenditure types across campus. These categories help classify purchases of goods, services, and equipment, as well as reconciling travel and entertainment expenses. Organized by purchase category, the page features searchable tables for quick access

to relevant information. Whether you're looking to streamline your purchasing and expense process or better understand expenditure types, this resource is designed to assist you. Visit Commonly Used Expenditure Types on Blink today!

Introducing E-Market Services: A UC San Diego E-Commerce Solution
UC San Diego's Central Cashier's Office would like to introduce E-Market Services, which in partnership with Transact Payments, offers UC San Diego departments a seamless e-commerce platform. From selling goods to managing events and subscriptions, E-Market Services has got you covered.

With the capability to accept all major credit cards, E-Market Services ensures seamless accommodation for your department's clientele. Additionally, leverage features such as discount codes, recurring payments, and adaptable fulfillment options to customize transactions according to your precise needs.

Want to request a new e-market for your department? Submit an E-Market Request Form today!

Get ready for CONCUR 2.0!
Concur 2.0 is more than a simple bug fix; it is a strategic reconfiguration of the site to minimize data entry requirements and enhance accounting visibility. Visit Concur 2.0 on Blink for a detailed list of all the enhancements going live on April 8, 2024.



BI & Financial Reporting

New Guides to Help Clean-up Default Projects

We would like to thank Sarah Almado of the VCHS Hypercare Analytics and Transactional Center (SWAT) for her work in creating three guides to help fiscal staff clean up their default projects:

How to Determine What Corrective Action to Take to Clean Up Defaulted Payroll

How to Find the Payroll-Related PPM Transactions for an Oracle PPM Cost Transfer
How to Perform a Payroll-Related PPM Cost Transfer

These guides are linked on the Default Project Payroll Blink page under 'Do I need to do a UCPath Salary Cost Transfer or an Oracle Cost Transfer?'

If you have developed a how-to guide that you think could help other staff across campus, let us know about it!

Campus Budget Office Updates

EPBCS Support Office Hours Now Available Every Thursday 11:00 AM - 12:00 PM via Zoom
Join us for weekly office hours if you have questions about budgeting in EPBCS.
Zoom: https://ucsd.zoom.us/j/91798780724

The EPBCS system will close at 5:00 PM on Monday, April 1st, 2024.

Tips & Tricks

Financial Operation - PADUA
To change the Start and End dates of a project, update a Task Date.
This rolls up to the Project Dates.

KB0033940 : How to Update Project & Award Data Using PADUA

Training & Support



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

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
At this week's Office Hours (3/21), Han Van Etten from Graduate Education and Postdoctoral Affairs will discuss how graduate student tuition and fees are posted to the financial ledgers and how to move tuition and fees retroactively. Eva Thiveos will also demo the new payroll projections pages on the Graduate Student Funding Report.

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, 1:00pm - 2:00pm, Wednesdays and Fridays 9:00am - 10:00am
- **Procurement Card**
  - Wednesdays, 9:00am - 10:00am

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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