

February 21, 2023 | 109th Edition



PerkinElmer Planned Maintenance

Please note that PerkinElmer's global ordering and fulfillment systems will be **offline for planned maintenance Friday February 24 11:00 AM PST – Monday March 6 3:00 AM PST**. Advanced Search orders received after February 24 will be queued until March 6 at 3:00 AM EST when they will be processed and sent to fulfillment. Request form orders will also be held and manually entered into the system by Customer Care starting on March 6. Please order ahead and avoid ordering from February 24 - March 6 if possible.

Share Your Honest Feedback on the UCPath Voice Survey

Have you completed an online UCPath training course on the UC Learning portal? We invite you to participate in a quick, 5-minute survey to share your **honest** opinion. Your feedback is critical for us to develop a better version of our UCPath training. The survey will close on **March 1, 2023.**



Click here to complete the UCPath Voice Survey.

Additional UCPath Resources:

- Subscribe to local UCPath communications to stay up-to-date on all things UCPath here.
- View all ongoing UCPath projects here.

UC San Diego Financial Accounting Program
The UC San Diego Financial Accounting Program is a complementary professional development opportunity being offered to help you become more effective in your role. It's flexible, available right now, and at no cost to you." Take the short assessment and APPLY NOW. An application including the assessment and supervisor endorsement is due **March 3, 2023**.

We encourage everyone who wants solid fundamentals in finance and accounting to take the introductory course, Financial Accounting for Non-Accountants (FAFNA), either as a stand-alone or as part of the full program that includes additional courses. Enrollment consideration will be given to staff with fiscal responsibilities (e.g., Research Administrators, Fund Managers, Financial Analyst, Business Officers etc.). This program is a great way to gain critical skills that will benefit your current and future career path. Click here for more information.



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

IPPS Hot Topics: Concur on Your Device
Wednesday, February 22 @ 10:00am - 11:00am
Learn about various mobile and electronic features available with Concur that can make your travel and reconciliation easier.

Oracle: Buying and Paying for Goods & Services
Thursday, February 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

Fund Management Office Hours

Every Thursday

11:00am - 12:00pm

This week Heather Vinograd will be stopping by to talk about Concur charge-offs and fiscal year-end expense accruals. Afterwards get your questions answered. Solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

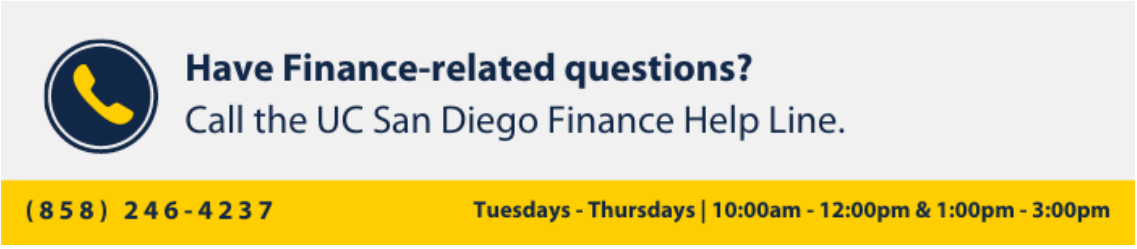
Reporting Workshop: Dashboard of the Week Series

Monday, February 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 **DOPES** report**.**

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).



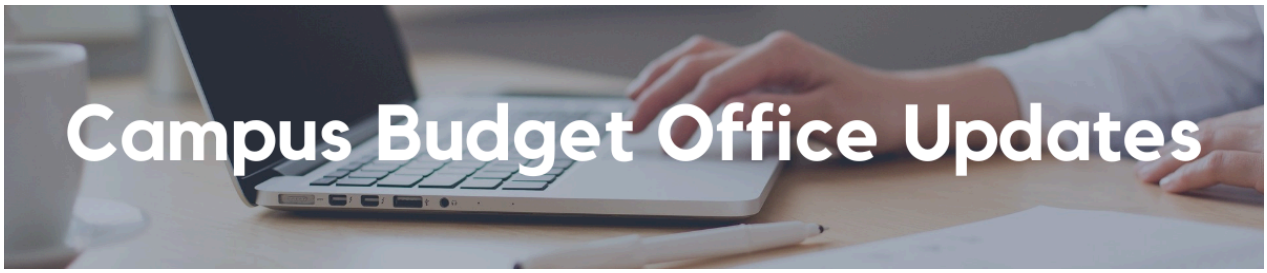
Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer Finance-related questions.

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!



Launching New Emailed Reports
Starting next week five new emailed reports will be triggered based on a set of criteria related to either cost transfers or PPM Contract Invoices. Examples of the emails and the corresponding reports are linked below.

- Cost Transfers Not Processed Due to Validation Errors
- Cost Transfers Canceled
- PPM Contract Invoices Transfer Accepted
- PPM Contract Invoices Transfer Rejected
- PPM Contract Invoices Emailed



The 2023-24 Campus Budget Development Cycle is Underway

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

This year's budget entry deadline is **March 30th**. If you missed our Oracle Budget training sessions, the recordings and slide decks from those sessions are now available.

CBO Office Hours
Every Thursday 10:00am – 11:00am
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.

Registration is Open for Smart View Reporting Training
Oracle Budget Data: Smart View Ad Hoc Tips and Tricks (Beginner)
Oracle Budget Data: Smart View Ad Hoc Querying (Intermediate/Advanced)

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

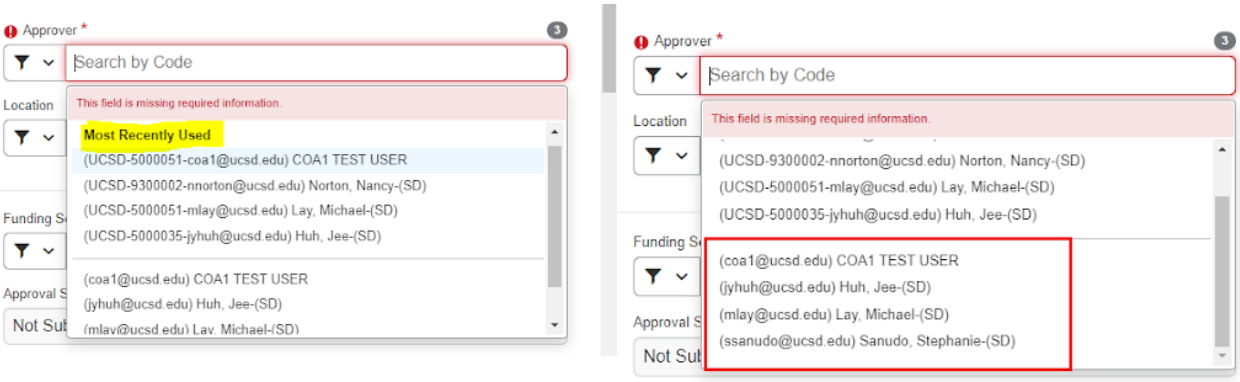
Planning and Budgeting system (EPBCS).

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)**.



Filling in Chart String Fields in Concur Tip
When filling in your chart string information in a Request or an Expense Report in Concur, avoid selecting from the Most Recently Used Section when the dropdown appears.

The reason for this is because the Most Recently Used selections might contain outdated data which would cause validation issues when trying to save the specific field.



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.

Visit Our Website | Subscribe to our YouTube | Contact Us

UC San Diego

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