

# Budget & Finance Weekly Digest

February 21, 2023 | 109th Edition

## Announcements



### 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**.

# The UCPath VOICE Survey



Share your honest opinion!

[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.

# Training & Support



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.

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## **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
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## **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!

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## **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.

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### 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).

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

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**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!*

# BI & Financial Reporting

### 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](#)

# Campus Budget Office Updates

## The 2023-24 Campus Budget Development Cycle is Underway

Access the EPBCS production environment to complete your FY24 operating budget at <https://planning-ekgs.pbc.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)**.

## Tips & Tricks

### **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.

A screenshot of a web form with a dropdown menu for 'Approver \*'. The dropdown is open, showing a search bar with 'Search by Code' and a list of users. The first item, '(UCSD-5000051-coa1@ucsd.edu) COA1 TEST USER', is highlighted in yellow and labeled 'Most Recently Used'. Other users listed include Norton, Nancy-(SD), Lay, Michael-(SD), and Huh, Jee-(SD). A red error message 'This field is missing required information.' is visible above the dropdown.

A second screenshot of the same 'Approver \*' dropdown menu. The list of users is scrolled down, showing Norton, Nancy-(SD), Lay, Michael-(SD), and Huh, Jee-(SD). Below these, a red box highlights the bottom three items: '(coa1@ucsd.edu) COA1 TEST USER', '(jyhuh@ucsd.edu) Huh, Jee-(SD)', and '(mlay@ucsd.edu) Lay, Michael-(SD)'. The error message 'This field is missing required information.' is still present.

### The Support Framework: Your Guide to Finding Help

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



# Support Framework

Not sure where to find answers? Our support framework is designed to help the Budget & Finance community, including faculty or staff with financial responsibilities, identify resources.

## TIER 0

### What Can I Do On My Own?

#### Applies to you if you:

- Want to find published support information anytime
- Don't want to wait in line for your question to be answered
- Don't know who your department Subject Matter Experts (SME's) are

#### Self-Service Resources:

- Your immediate Supervisor
- [Budget & Finance User Group](#)
- [Knowledge Base Articles](#)
- [Community of Practice](#)
- [Published Information in Blink](#)
- [Training Videos](#)

## TIER 1

### Where Can I Get Help?

#### Applies to you if you:

- Have a question that is unable to be answered by your department SME or self-service resources
- Have a question that can be quickly answered by a knowledgeable representative
- Need to process a transaction in Services & Support
  - E.g. "I need you to process/approve/route..."

#### Resources:

- [Attend an Office Hours session](#)
- [Contact the Finance Help Line](#)
- [Submit a request ticket in Services & Support](#)

## TIER 2

### Who Can Help Escalate?

#### Applies to you if you:

- Are unsure how to submit your request/ticket
- Have submitted a ticket and are not receiving a response
  - Please try to give agents enough time to process your requests before escalating the ticket
- Identify something that does not seem to be working properly

#### Resources:

- Contact the central support team directly at [financesupport@ucsd.edu](mailto:financesupport@ucsd.edu)
- Submit a ticket to [Budget & Finance Support](#)
- Find the form in our [Request Catalog](#) to process your transaction request

## TIER 3

### How Do I Suggest Enhancements?

#### Applies to you if you would like to suggest:

- An enhancement to a financial system
- Idea to streamline a financial business process
- Oracle & Concur financial reporting enhancement

#### Resources:

- [Budget & Finance Suggestion Box](#)
- [Business Analytics Hub Help Page](#)

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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