

Budget Bulletin

February 25, 2021 - 5th Edition

Updates for Oracle Planning & Budgeting

Gift funds planning form 5.2 is now available!
In response to user requests to incorporate gift funds planning for the FY22 budget year, the project team has developed a new gift planning form in Oracle Planning and Budgeting. Locate this form under task list 5. Reference this KBA to learn how to use the form: How to Budget Revenues and Expenses on Gift Funds on Form 5.2

New KBAs available and more coming soon!

- How to Add or Remove an Employee Distribution Line in Form 1.2 or Form 2.2 – NEW
- How to Create a Vacant Position in Form 1.2 or Form 2.2 – NEW!
- How to Transfer an Employee in Form 1.2 or Form 2.2 – NEW
- How to Budget Pooled Salaries in Form 1.4 or Form 2.4 – NEW
- How to Push Salary and Benefits Data in Form 1.5 or Form 2.5 – NEW
- How to Budget Core Recurring Funds on Form 4.2 – NEW!
- How to Budget Core OneTime Funds on Form 4.3 – NEW!
- How to Budget Revenues and Expenses on Unrestricted Funds on Form 5.1 – NEW!
- How to Budget Revenues and Expenses on Gift Funds on Form 5.2 – NEW!
- Resource Allocation Transfer Account Guidance – NEW!
- How to Restore an Employee from Snapshot Roster in EPBCS
- How to Plan Non-Salary Expenses on a Project.Task in EPBCS Form 3.3

- FAQ: Preparing a Budget in Oracle Planning and Budgeting
- FAQ: Compensation Planning in Oracle Planning and Budgeting for Staff and Faculty

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Additional Resources & Support

Attend office hours!
Office Hours are held every Thursday, 10:00am-11:00am, through April 2nd. Bookmark the office hours web page for quick access to the Zoom link: https://blink.ucsd.edu/finance/support/training-events/officehours.html

Need additional training?
Contact the budget subject matter expert (SME) to see if there are additional upcoming training support sessions within your area. Campus Budget Users and SMEs

Want to learn more about Smartview Excel add-on for connecting and submitting budget data to the Oracle Planning and Budgeting system?
Start here by watching this short eCourse on Smart View. Office hours support sessions for Smart View functionality and use with the Oracle Planning and Budgeting system are held every Thursday 9:00am-10:00am through April 2nd for budget users interesting in using Smart View. Smart View Office hours and the Zoom link will be posted on the Budget & Finance Community of Practice - Budget and Planning.

Reminder! Enter your budget in the Live Production Environment
The budget development deadline is April 2nd. Be aware of which system environment you are in when entering your budget! Please reference the Oracle Planning and Budgeting web page with quick links to the training and production environments. https://blink.ucsd.edu/finance/support/fis-project/oracle-planning-and-budget.html

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About the Budget Bulletin

The Budget Bulletin is delivered to budget preparers and Financial Officers to share information and important updates related to Oracle Planning & Budgeting in prepartion for go-live.

For knowledge base articles or to submit a question to the Campus Budget Office, please visit the Budget and Planning section of the UC San Diego Services & Support portal.

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial information system and support departments' success in managing their fiscal responsibilities.

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