

# Budget & Finance Weekly Digest

November 9, 2021 | 45th Edition

## Announcements



### Oracle Planning and Budget Tool (EPBCS) – Scheduled System

#### Downtime for Planned Update: 11/09/21 – 11/16/21

First, we are on track to release the reconfigured Resource Commitment Tracking Tool and some budgeting enhancements by **Tuesday, November 16!** The basic concepts of resource commitment tracking remain the same, and the key benefits of this reconfiguration include, but are not limited to:

- Streamlined actions
- Automatic calculations
- Improved alignment between planned resource commitments and how they are transacted on the GL

We are currently updating existing Knowledge Base Articles, KBAs, to release alongside the reconfigured tool - Stay tuned!

In order to minimize disruption and ensure the quality of your data, **the EPBCS production (Planning) environment will go offline at 5:00pm next Tuesday, November 9**, after the October GL journal submission deadline. It will be back **online starting Tuesday, November 16**. During the scheduled downtime, users will not be able to log into EPBCS production (Planning) environment nor will they be able to run any reports or ad hoc queries using EPBCS data, including reports linked to the Budget and Financial Management Reporting Panorama.

We look forward to the release of the reconfigured tool, and hope you will find the updates lead to a significantly improved user experience.

### **IDC Assessment is now Per Transaction**

IDC Assessment is applied on an **assessment per cost transaction** basis as of November 5. The IDC assessment calculation is run daily with charges applied to each transaction that is subject to IDC. The IDC (burden) cost will have the same Expenditure Organization and Expenditure Item date as the direct cost. Future releases of Oracle may include a direct reference to the direct cost transaction number, but that feature is currently not available. This change will create more individual costs, but will help to reconcile IDC on sponsored projects.



### **Financial Accounting Program, Winter Quarter Application Open!**

The UC San Diego Financial Accounting Program Application for Winter Quarter is currently active and open until **Friday, November 19!** We have updated the application from Fall Quarter to include clearer instructions and modified a few questions. Please note that the first page of the application will display an overview of how many sections of questions there will be. Once you proceed to the next page of any section, you will not be able to return to the previous page.

If you are interested in starting in Spring or Summer Quarter, we encourage you to also apply. We are continuously looking to fill seats in future quarters and it will provide us a better picture of demand.

Additionally, we are looking to support as many course interests as possible so keep an eye out for a question that offers the option to select your interest in completing the entire program or select courses.

**If you have already applied during the September round of applications, [please use this link](#) to indicate if you are still interested starting during Winter Quarter. If you are no longer interested in starting Winter Quarter and would like to begin in Spring Quarter or would like to withdraw completely from the program, please indicate "No, I Cannot Attend" in the link above and**

email [financesupport@ucsd.edu](mailto:financesupport@ucsd.edu) with further details.

[The link to the application form is here.](#) The deadline of the application is **Friday, November 19**. You have 10 days left to apply!

Apply Now!



### **Oracle Redwood Launching January 2022**

In July 2021, changes to the Oracle Sign In page were communicated as part of a larger transition to the new Oracle Redwood User Interface (UI). In January 2022, after the Winter Break, UC San Diego will introduce Oracle's Redwood theme to our campus.

#### **What is changing?**

Overall coloring using a different color palette, layout, look and feel:

- Dark, global header
- Slightly darker background
- A shift from icons to tabs on the Oracle homepage

#### **What is not changing?**

The Oracle Redwood theme is a UI change only, and does not impact performance of the system:

- No changes to the underlying database
- No changes to the data within the Oracle applications
- No changes to your ability to perform tasks or functions within OFC
- No impact to any integrations or external system

#### **Oracle Redwood Preparation Toolkit**

- [Oracle Redwood UI Blink Page](#)
- [Oracle Redwood Quick Start Guide](#)
- [Oracle Test Non-Production Environment\\*](#)

- If you or your teams have created local training materials, be sure to update accordingly.

\* You can view the upcoming Oracle Redwood UI changes in the Oracle Test Non-Production Environment - VPN and SSO are required. **Since this is a test environment, data may not be the same as in production.** If you experience issues during login, you can request access by emailing [financesupport@ucsd.edu](mailto:financesupport@ucsd.edu) with the subject "Oracle Redwood Preview".

To prepare for the launch of the new Oracle Redwood theme, **we encourage you to attend an Oracle Redwood Preview Session** held on [Wednesday, November 17 \(12:00 - 12:30pm\)](#) or [Thursday, December 2 \(9:00 - 9:30am\)](#). A preview session will be recorded and uploaded to the [Oracle Redwood UI Blink Page](#) for those that cannot attend.

Stay tuned for more information. We thank you for your continued support!



### [University Procurement Card Program](#)

**Tuesday, November 16, 2021 @ 1:30pm - 4:00pm**

Current and prospective cardholders will learn about updates to the card program, common uses, and the Concur processes for both Procurement Card request and transaction reconciliation.

Note that this is not an introductory course. Participants must first complete [the associated eCourse](#) available through the UC Learning Center.

### [Oracle Redwood Preview Session](#)

**Wednesday, November 17 @ 12:00pm - 12:30pm**

Register for the Oracle Redwood UI Information Session to get a firsthand glimpse into the new Oracle theme, set to launch January 2022! To prepare for the Oracle Redwood Preview Session, [review the Preparation Toolkit](#) and be sure to have your questions ready.

### [Hot Topics: End of Year Preparations](#)

**Tuesday, November 30, 2021 @ 10:00am - 11:00pm**

Join the IPPS Team for the next session of Hot Topics! This session will focus on how best to prepare your transactions to meet the calendar year deadlines for the Procure-to-Pay and Travel & Expense spaces. There will be a chance to participate in Q&A at the end.

### **IPPS Office Hours**

Integrated Procure-to-Pay Solutions (IPPS) made some changes to its Office Hours schedule, effective November 1:

- We have extended Office Hours until the winter closure
- We added a **new** session on **Fridays at 9:00am** using the same Zoom
- Monday and Wednesday Office Hours start times will remain the same, but we are asking that everyone arrive at least 10 minutes before the end of office hours
- The Procurement Card team is only available at Wednesday Office Hours

Remember, you can see the complete [Office Hours Schedule in Blink](#).

*View 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!*



### **Oracle Procurement Glossary**

The [Oracle Procurement Glossary Blink page](#) contains definitions and explanations of several terms including distribution fields, PO statuses, PO funds statuses, and essential purchasing and payment terminology.

### **Services & Support Tickets**

For Service & Support tickets, for questions related to balances or transactions, please attach supporting reports from Oracle to the case. This will assist the agents in reviewing the same reports or transactions that are in question.

## Red vs. Yellow Icon Alerts in Concur

There are two types of alerts in Concur:



**Yellow icon alerts** provide information for the user's consideration when submitting a Request or Expense Report; the expense can be submitted. You may proceed with completing and submitting the Expense Report.



**Red icon alerts** indicate a hard stop related to a COA/POETAF error or a policy requirement; the expense cannot be submitted. You must change or remove the expense in order to resolve the alert error. Note that the error alert message will remain in the audit trail as a Previous Comment.

For more information on Concur Alerts, refer to the [How to Resolve Alerts in Concur KBA](#).

Each Tuesday, the Weekly Digest provides important updates related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense.

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