Budget & Finance Weekly Digest



January 30th, 2024 | 156th Edition

Announcements

Financial Accounting Program: Upcoming Information Sessions
The UC San Diego Financial Accounting Program is a complementary professional development opportunity being offered to help you become more effective in your role. This program is currently offered at no cost to eligible career employees through the end of the fiscal year (Spring 2024)!

We invite you to hear more by attending an upcoming Information Session for the following dates. Please register using links below:

- Tuesday, February 27, 2024 @ 10:00am - 11:00am
- Thursday, February 29, 2024 @ 1:00pm - 2:00pm

You are encouraged to share this information with your teams, colleagues, and those who may be interested in participating in the full program or Financial Accounting for Non-Accountants (FAFNA) as a standalone course.

We appreciate the partnership with UC San Diego Division of Extended Studies and the support from supervisors across campus and health sciences.

Level Up with Oracle Guided Learning! Coming February 2024
We're excited to shed light on the new developments surrounding Oracle Guided Learning (OGL); this addition is designed to simplify and improve your work experience. Our one-page information guide serves as a quick reference for the key components of OGL's first-phase strategy.

And that's not all—our team is currently working on dedicated Blink content that will feature different aspects of the OGL, keeping you updated with the latest news, announcements, and important points. Oracle Guided Learning is more than just a tool—it's a strategic move towards enhancing operational efficiency and improving your experience.

Annual Traveler Satisfaction Survey
The system wide travel program offers UC travelers across all 10 campuses and various medical and research centers access to many value-added benefits, such as priority boarding, preferred seating and other upgrade opportunities.

UCoP's Central Travel Office manages ongoing relationships with major airlines, hotels and car rental companies, and they would like your help in assessing the program by completing this survey by February 9, 2024.

Take the Survey

In appreciation of your time filling out the survey, UCoP's Central Travel Office will hold a drawing for the following items: GRAND PRIZE where ONE (1) winner will get TWO (2) United Airlines tickets anywhere United flies and FIVE (5) winners will receive a Southwest Airlines status upgrade to "A-List" (full terms and conditions can be found in the survey link). Only UC email addresses will be eligible for these giveaways.

Your ongoing support of the travel program is valued and appreciated.

BI & Financial Reporting

New Report: Payroll Transaction Lookup
This new report identifies all Oracle PPM transactions for a given person and Earnings Period End Date. It identifies all UCPath source transactions, such as salary, benefits, accruals, and general liability, as well as non-UCPath source transactions, such as NGN, HSIT, and tuition. Use the report to identify all associated transactions when PPM cost transfers of payroll are necessary, or to understand the history of payroll transfers.

The report is available to run directly on the Payroll Accounting and Reconciliation tab on BAH Budget & Finance, or drill down to it from the Expenditure Date on the 'Oracle + LL Summary' tab of the Default Project Payroll report.

Campus Budget Office Updates

Reminder! Training Begins This Week! Oracle Budget (EPBCS) Via ZOOM and In Person
Please make sure you select Zoom OR the classroom option. In person sessions are a good opportunity for those who are new to the EPBCS system or the University to get to know our team and a more hands on experience. Participants should register for both compensation and non-compensation training. Register for Zoom or Classroom sessions using the links below:

- Oracle Budget: Budgeting Salaries and Benefits for Academic Units - Register Here
- Oracle Budget: Budgeting Salaries and Benefits for Admin Units - Register Here
- Oracle Budget: Non-Compensation Expense Planning - Register Here
- Oracle Budget: Budgeting Salaries & Benefits in Smart View - Register Here
- Oracle Budget: Budgeting Non-Compensation in Smart View - Register Here
- Oracle Budget Data: Smart View Ad Hoc Tips and Tricks - Register Here
- Oracle Budget: Budgeting Capital Projects - Register Here

These training sessions are designed to help you navigate the Oracle Planning and Budgeting system (EPBCS) and improve your understanding of the budgeting process. We encourage all

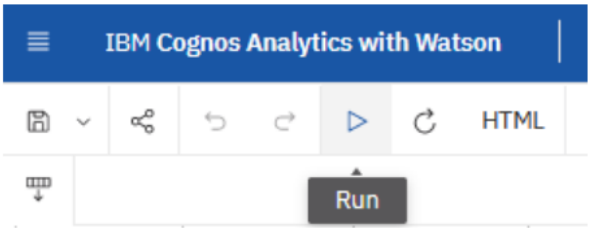
staff members who are involved in the budgeting within EPBCS for their areas to take advantage of these training opportunities. Training for repeat users is not required but optional.

If you have questions regarding which training sessions to attend, please attend the budget Information session on 1/23/24 or submit a ticket to us under the Services and Support Budget & Finance Ticket portal: https://support.ucsd.edu/finance. Please select: Oracle Planning & Budgeting (EPBCS) -> Oracle Planning & Budgeting (EPBCS) Training Inquiries

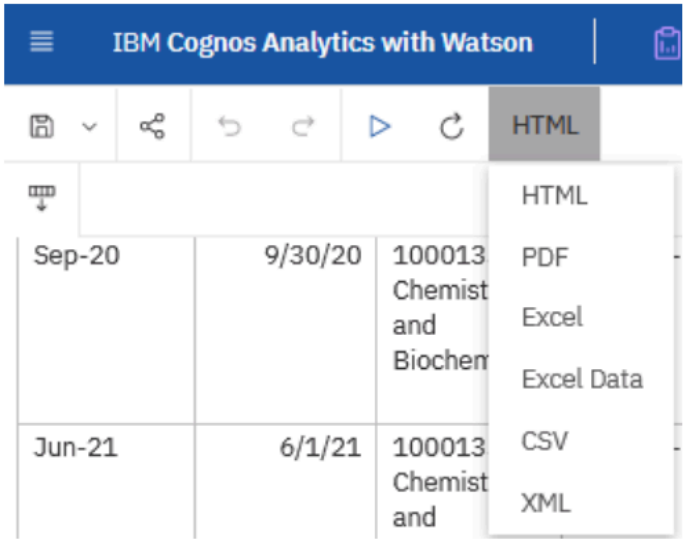
Tips & Tricks

Cognos and Oracle Tips & Tricks

After running any Cognos report, click the Run button to return to the prompt page.



After running any Cognos report, download to Excel or PDF by changing the format. After downloading, change back to HTML format by changing the format back to HTML.



Training & Support

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

Internal Control & Accounting (ICA) Office Hours

Wednesday, January 31, 2024 @1:00pm - 2:00pm (last Wednesday of the month)

Join us and ask questions related to Payroll reconciliation, Intercampus Recharges, ITFs, General Ledger, Fixed Assets and more in an open forum discussion.

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.

RESCHEDULED: UC San Diego Travel: Before You Go

Thursday, February 1, 2024 @ 9:00am - 11:00am

The course will include an in-depth explanation of topics covered in the Concur Travel and Expense eCourse. This course will be especially valuable for employees who travel or book business travel and want to further their understanding of travel preauthorization and UC San Diego's instance of Concur Travel booking tool. Intended for travel arrangers, delegates, travelers, and financial managers who are familiar with Travel Policy G-28 and would like to learn about more advanced Concur Travel terminology and concepts.

Topics Covered:

- Review the process to request travel preauthorization via Concur Request
- Be able to request a new University Travel & Entertainment Card
- Learn how to book travel via Concur Travel

Fund Management Office Hours

Every Thursday 11:00am - 12:00pm

At this week's office hours, IPPS staff will share a new process for closing purchase orders. We will also demo the new Payroll Transaction Lookup tool and provide guidance on how to read it.

Concur: Event Expenses & Other Reimbursements

Thursday, February 15, 2024 @ 9:00am - 10:30am

The course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. This course will be especially valuable for employees who host meetings and events and want to further their understanding of the expense reconciliation process via Concur. Also, those who previously utilized MyPayments for requesting employee reimbursements for business expenses may attend this course. Intended for preparers, meeting/event hosts, financial managers, and entertainment approvers who are familiar with Entertainment Policy BUS-79 and would like to learn about more advanced meetings and entertainment terminology and concepts.

Topics Covered:

- Learn how to submit event payment requests and employee reimbursements via Concur
- Review the process to submit event vendor payments
- Be able to view and reconcile Travel & Entertainment card transactions

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UC San Diego Travel: Reporting Expenses

Thursday, February 22, 2024 @ 1:00pm - 3:00pm

Intended for: Those involved in the process of trip reconciliation for business travel at UC San Diego, including travelers, preparers (Concur Delegates) and approvers.

The course provides an overview of UC San Diego travel policy and procedure, including summarized guidelines, resources, and information about online tools.

In this course, you will learn about Concur processes for prepaying travel and claiming expenses after the business trip occurs in accordance to Travel Policy G-28.

Topics Covered:

- Arranging for prepayment of fees, such as registration
- Making deposits, such as for hotels
- Reporting expenses
- Claiming traveler reimbursement

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.

Visit Our Website | Subscribe to our YouTube | Contact Us

UC San Diego

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