UCSB Financial Management Modernization
Training Town Hall
Participation Guidelines

• We want to hear from you!
• Use the Q&A feature to ask questions *(option to remain anonymous)*
• Share Feedback
• Email slsch@ucsb.edu for continued questions & feedback after today’s session
Today’s Topics

- Welcome & Introductions
- Office of Financial Training
- Training Approach
- Timeline
- Looking Ahead
- Questions & Feedback
Welcome & Introductions
Meet Your Training Team

Sandra Featherson  
Director of Training, FARM  
slsch@ucsb.edu

Heather Heyerdahl  
Director of Learning & Organizational Development  
hheyerdahl@ucsb.edu
Office of Research Collaboration

Lynsey Trueman
Business Process Design Lead
trueman@research.ucsb.edu

Katherine Tompkins
Business Process Design Lead
tompkins@research.ucsb.edu
Office of Financial Training
**Mission**
To empower UC Santa Barbara employees with the knowledge and resources to effectively understand the policies, procedures, and systems needed to successfully perform their job responsibilities.

**Vision**
To enhance the UCSB campus community by providing centralized financial training resources that are clear, consistent, convenient, and comprehensive.
Activities to Date

- **Collected Feedback:** Focus groups, BFS, UCSB AMP, survey
- **Created a** Training Needs Assessment
- **Identified Key Themes:**
  - Most critical skills gap: financial knowledge
  - Top 3 training needs: procedures, policies, budgeting
  - Requests: hands-on, timely, dedicated trainers; learn from others; up-to-date materials; easy to access, frequent, responsive support; address specific scenarios & complete processes; explain the impact
Guiding Principles

Offer a Variety of Training Options
- In person, virtual, live, recorded, e-learning, in-app guidance
- “Just-in-time” learning

Focus on the Complete Picture
- Understand the policy and impact
- End-to-end business processes
- Understand how to use the systems

Learn by Doing
- Prioritize using test environments (“sandboxes”)
- Hands-on
- Scenario-based
Guiding Principles

Build Communities of Practice
- Share best practices
- Mentoring
- Peer Support

Dedicate Training Resources
- Training Team
- Responsive support before, during, & after
- Subject matter experts

Centralize Knowledge
- One location for information
- Easy to use
- Up to date
Areas of Training

- Interdependent
- Ongoing
- Variety of modalities
  - In person & virtual
  - Live & recorded
  - eLearning
  - Videos
  - Job aids
  - In-app guidance

Core Financial Principles
101 & 201

Business Processes/Policies
The HOW and WHY

Oracle Financials Cloud
The SYSTEM
Digital Adoption Platform Preview

- “Just-in-time” learning
- In-app guidance as you complete daily tasks
- Rollout:
  1. Concur - pilot in late ‘23
  2. Oracle Financials Cloud - ‘24
Phase 1: Core Financial Principles

UCSB Finance 101: The Fundamentals

• Content:
  • Ethics and Fraud in the Workplace
  • Fund Accounting - Common Chart of Accounts
  • Travel Policy/Concur
  • Entertainment - catering
  • Purchasing
  • Data Warehouse/Reporting Basics
  • Cash Handling/Credit Cards

• Audience: New to university/role, those who want a “refresher”
Core Financial Principles 101: The Fundamentals

Fall Program

- Ethics & Fraud in the Workplace
- Fund Accounting - CCOA
- Travel Policy / Concur
- Entertainment - Catering
- Purchasing
- Reporting / Data Warehouse
- Cash Handling / Credit Cards
Phase 1: Core Financial Principles

UCSB Finance 201: Stewardship

• Content:
  • Data Warehouse/Reporting - Advanced
  • Internal Controls - DSA Responsibilities
  • Resource Management
  • Budgeting
  • Staffing
  • Risk Management

• Audience: Supervisors, Staff with Signature Authority, Business Officers, tbd
Planned Topics to Offer:

Finance 101: Fundamentals

• Ethics and Fraud in the Workplace
• Fund Accounting - Common Chart of Accounts
• Travel Policy/Concur
• Entertainment - catering
• Purchasing
• Data Warehouse/Reporting Basics
• Cash Handling/Credit Cards

Finance 201: Stewardship

• Data Warehouse/Reporting - Advanced
• Internal Controls - DSA Responsibilities
• Resource Management
• Budgeting
• Staffing
• Risk Management
Phase 2: Oracle Financials Cloud (OFC)

Content: Using the System

• Access/Roles
• Understanding the Common Chart of Accounts
• Functionality/Processes
• Contracts & Grants
• Reporting
# Training Timeline

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<thead>
<tr>
<th>2023</th>
<th>2024</th>
<th>2025</th>
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<tbody>
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<td>Jul</td>
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<td>Sep</td>
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## Core Financial Principles

**Phase 1: Core Financial Principles**  
Fall / Winter / Spring FY 2023-24  
- Ongoing  
- Incorporate Future State info & processes whenever possible  
- Timing dependent on finalizing processes & CCOA

## Phase 2: Oracle Financials Cloud

- 6 months prior to Go Live  
- Sandbox environment  
- Digital Adoption Platform
Looking Ahead

• Schedule and Registration for CFP101 and CFP 201
• Office of Financial Training Website
• Digital Adoption Platform Rollout
• Join us for the FMM Walkabout!
  • Tuesday, October 17 from 2-4 p.m. in Corwin Pavilion
• Contact Sandra Featherson slsch@ucsb.edu if we don’t get to your question
Your Feedback
Ask questions, get clarification, share ideas
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