

September 13, 2023

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



Keep an eye out for
new content!

Welcome & Introductions

Meet Your Training Team



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Office of Financial Training

UC **SANTA BARBARA**
Office of Financial Training
Finance & Resource Management



WORK IN PROGRESS

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

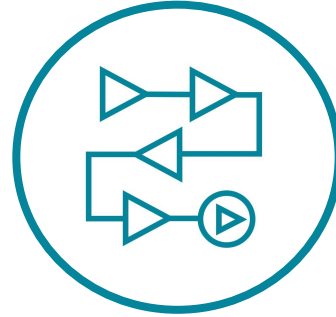
- **Collected Feedback:** Focus groups, BFS, UCSB AMP, survey
- **Created a Training Needs Assessment**
- **Identified Key Themes:**
 - **Most critical skills gap:** financial knowledge
 - **Top 3 training needs:** procedures, policies, budgeting
 - **Requests:** hands-on, timely, dedicated trainers; 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



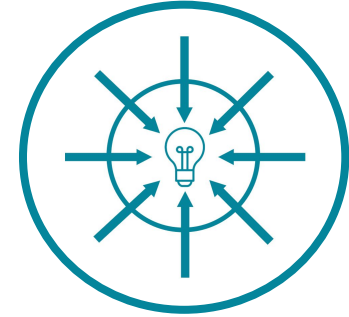
Build Communities of Practice

- Share best practices
- Mentoring
- Peer Support



Dedicate Training Resources

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

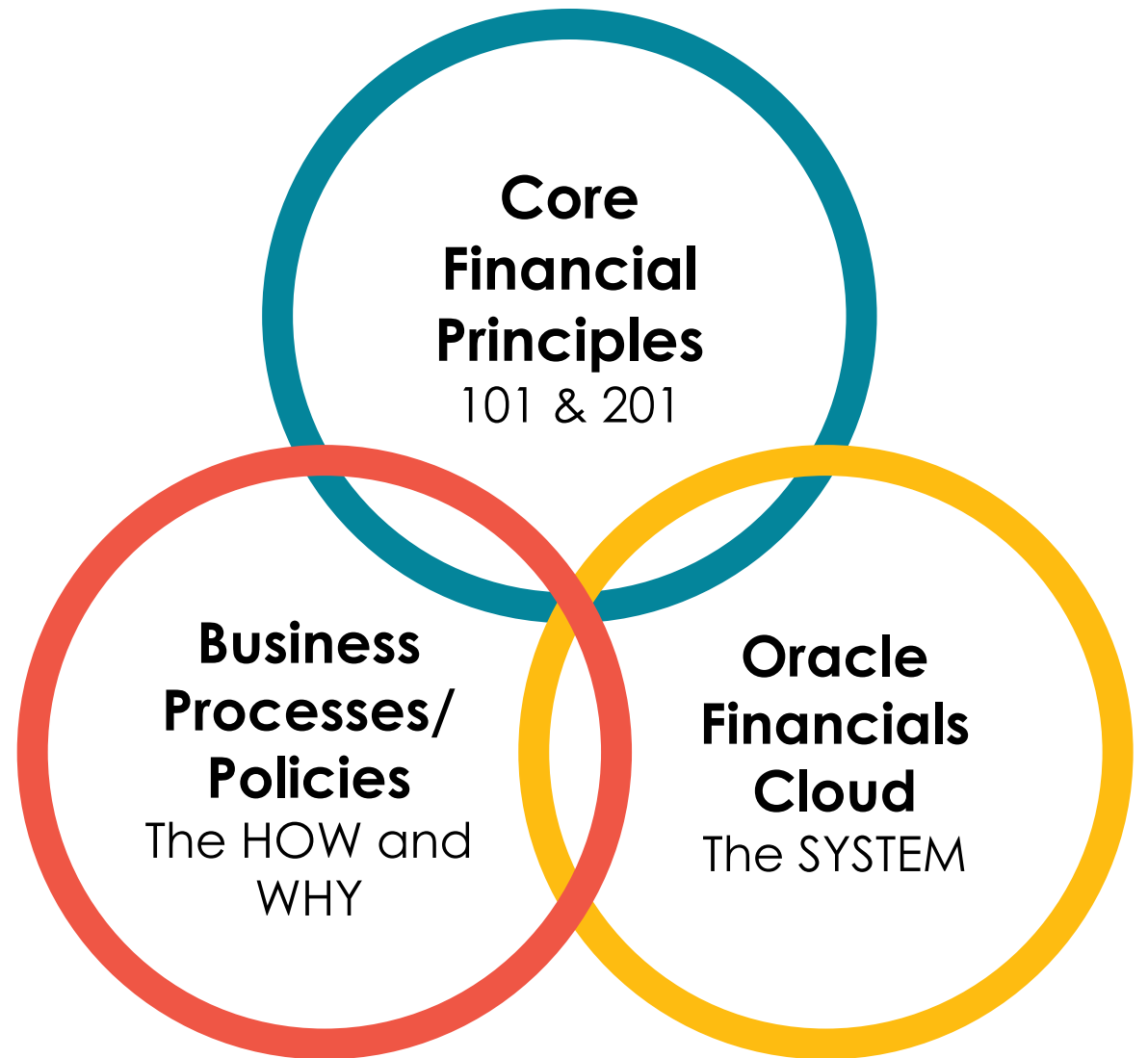


Centralize Knowledge

- One location for information
- Easy to use
- Up to date

Areas of Training

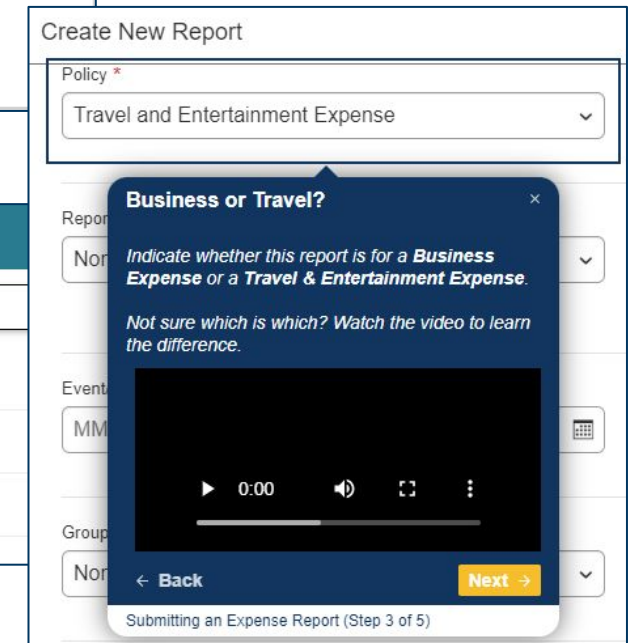
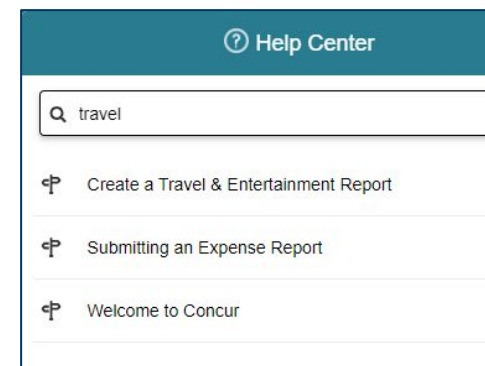
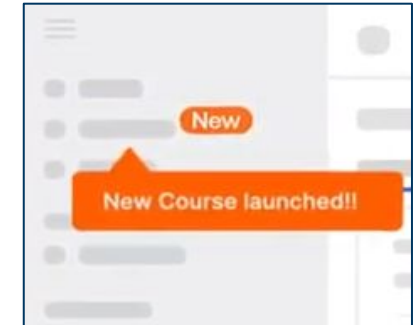
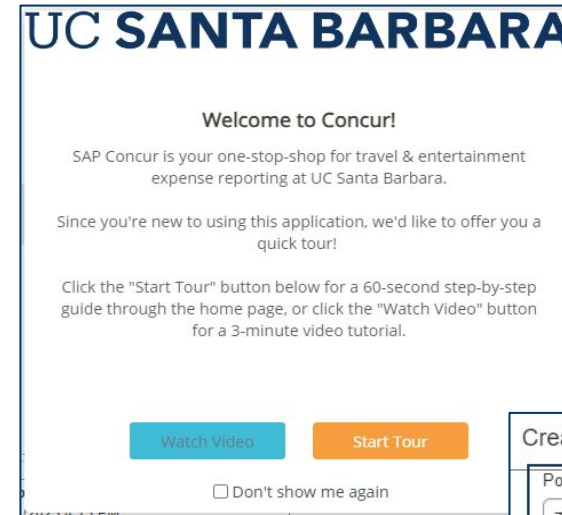
- Interdependent
- Ongoing
- Variety of modalities
 - In person & virtual
 - Live & recorded
 - eLearning
 - Videos
 - Job aids
 - In-app guidance



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

| 2023 | | | | | | 2024 | | | | | | | | | | | | 2025 | | | | | | |
|------|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|
| Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul |

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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