

Divisional Finance Leadership Forum

March 16, 2018

Faculty Club, Heyns Room

1pm – 2pm



Tracy Okamura
Director, Business Financial System
BFS Upgrade



BFS is getting a facelift

- Modernizing the navigation
 - Changing from menu driven to tile driven
 - Three or fewer clicks to get to destination page
 - Most users will have 1-3 homepages
- No changes to security
- No major changes to functionality – detail pages look the same
- Homepage design based on input from our dfl and ra work groups
- Over 100 testers executing over 1300 test scripts over 6 weeks with a current pass rate of 99%
- Go live 4/3/2018

BFS is getting a facelift

ORACLE

▼ BFS Home

News and Events

- This environment is a copy of production from: 1/22/2018
- GL and PO are open for period 8 and 9 for business units 10000 and J0000
- AP BI and AR are open for period 8 and 9 across all business units
- January payroll file has been entered on: 2/02/2018
- We are extending the testing period from Friday March 2nd until the end of the day Tuesday March 6th
- End-To-End testing will be performed the week of March 12th - March 16th

We have created a [quick video](#) to help bring you up to speed with the new changes introduced in the latest upgrade. If you encounter an issue when testing, please do not hesitate to [record the issue here](#) so the BFS team can resolve the issue as soon as possible.

Approvals

General Ledger

BIBS

Accounts Payable

Customers and Contacts

Accounts Receivable

Billing

Grants

Profile Management

Reporting Tools

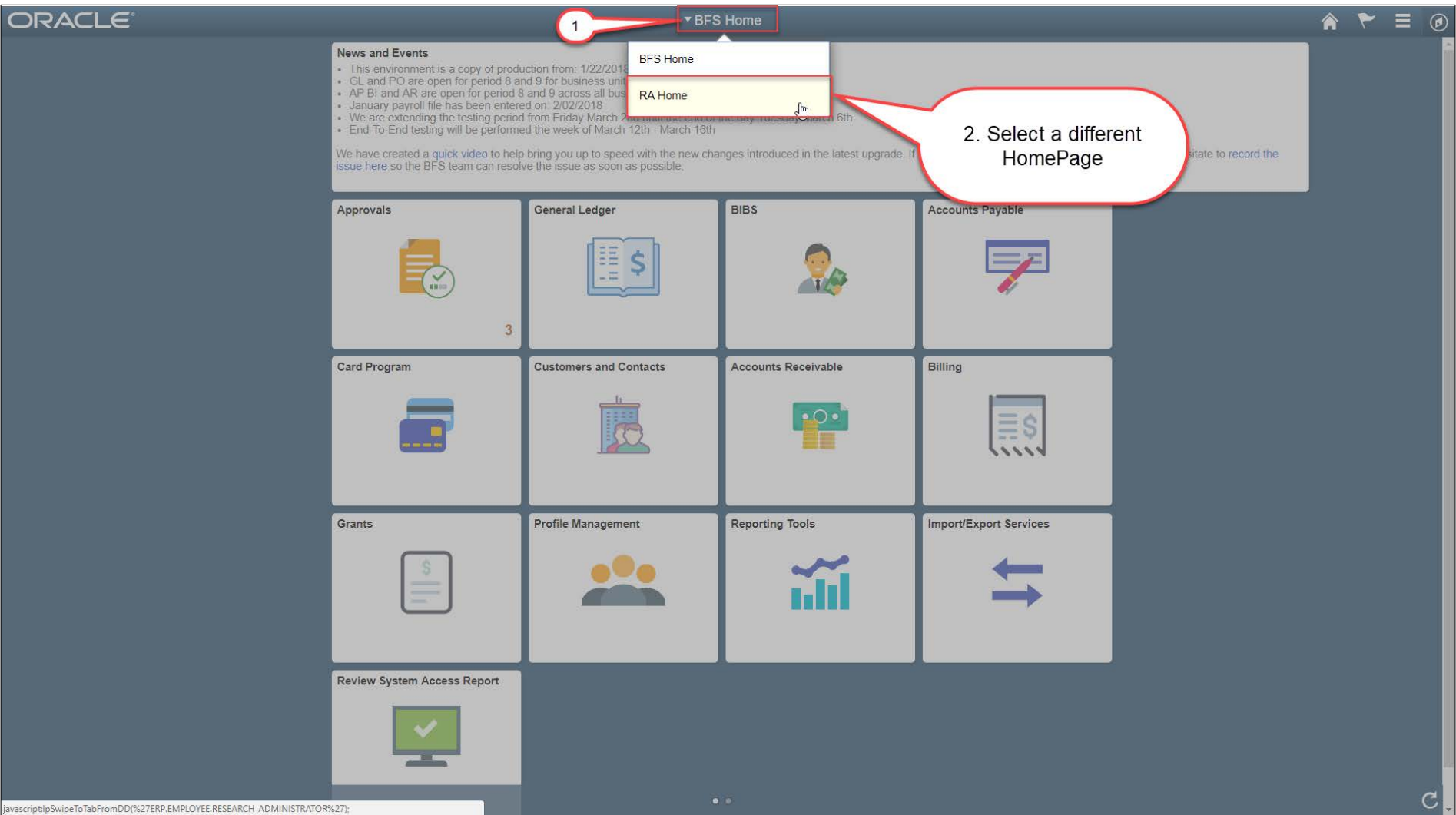
Import/Export Services

Review System Access Report

The News and Events tile will have important information about upcoming maintenance and system enhancements.

javascript:submitAction_win0(document.win0,'PTNUI_LAND_WRK_GROUPBOX14');

BFS is getting a facelift



BFS is getting a facelift

The screenshot shows the Oracle BFS Home dashboard. At the top left is the Oracle logo. The main header is 'BFS Home'. Below this is a 'News and Events' section with several bullet points. The dashboard is organized into a grid of application tiles: Approvals, General Ledger, BIBS, Accounts Payable, Card Program, Customers and Contacts, Accounts Receivable, Grants, Profile Management, Reporting Tools, and Import/Export Services. A 'Review System Access Report' tile is at the bottom left. On the right side, there is a 'NavBar: My Favorites' panel. A red circle with the number '1' points to the 'My Favorites' star icon in the NavBar. A red arrow points from a text box to the 'Reconcile Statement' link in the NavBar. The text box contains the following text:

2. If you have any saved favorites in the production environment they will be in the upgraded environment.

BFS is getting a facelift

The screenshot displays the Oracle BFS Home interface. At the top, the Oracle logo is on the left, and the title 'BFS Home' is in the center. The main area features a grid of tiles for various functions: Approvals, General Ledger, BIBS, Accounts Payable, Card Program, Customers and Contacts, Accounts Receivable, Billing, Grants, Profile Management, and a Review System Access Report tile. A 'News and Events' section is at the top left, and a 'My Favorites' section is on the right. A red circle with the number '1' highlights the top right corner, specifically the 'Classic Home' button. A red circle with the number '2' highlights the 'Navigator' tile in the 'My Favorites' section. A red circle with the number '3' highlights the 'Approvals' tile. A speech bubble with the text '3. If you can't find a page in the new tile navigation you can always go to your Navigator and find it in the old menu structure' points to the 'Navigator' tile. On the right side, a 'NavBar: Navigator' panel is visible, listing various modules: Supplier Contracts, BIBS, CAL Components, Customers, Customer Contracts, Order Management, Suppliers, Purchasing, eProcurement, Services Procurement, Grants, Program Management, Project Costing, Lease Administration, Billing, Accounts Receivable, and Accounts Payable. A red box highlights the entire 'NavBar: Navigator' panel.

ORACLE

▼ BFS Home

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Approvals

General Ledger

BIBS

Accounts Payable

Card Program

Customers and Contacts

Accounts Receivable

Billing

Grants

Profile Management

Review System Access Report

NavBar: Navigator

Recent Places

My Favorites

Navigator

Approvals

My Preferences

Classic Home

Supplier Contracts

BIBS

CAL Components

Customers

Customer Contracts

Order Management

Suppliers

Purchasing

eProcurement

Services Procurement

Grants

Program Management

Project Costing

Lease Administration

Billing

Accounts Receivable

Accounts Payable

3. If you can't find a page in the new tile navigation you can always go to your Navigator and find it in the old menu structure

BFS is getting a facelift

Worklist is replaced by Approvals tile and GL Approvals Workcenter

Worklist today

Favorites

Main Menu

Worklist

Worklist

Berkeley

UNIVERSITY OF CALIFORNIA

BFSQA92

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Personalize Page

Worklist for 012520898:

To narrow the results of the worklist or to retrieve a specific item, use the Worklist Filter below. Once you have selected your criteria (multiple fields can be used), click on the Worklist hyperlink at the top of this page. To remove all selected criteria, click on the clear filter button then the Worklist hyperlink.

Worklist Filter

Organization Level

Organization Node

Doc Type

From

Doc ID

Dept ID

Fund

ChartField 1

ChartField 2

Sort Field

Sort Order

Clear Filter

Worklist

Personalize | Find | 1 of 1 | Last

Summary

Detail

AP/PO

From	Date From	Document Type	Link
Rhodes, Carol	02/15/2018	ACTUALS GLJournalApproval	GLJournalApproval, 1097481, GLJournalApproval, 2013-12-04, N, 0, BUSINESS UNIT:10000 JOURNAL_ID:CSDEP0185 JOURNAL_DATE:2018-02-15 RDC:RA,0,A,

BFS is getting a facelift

Worklist is replaced by Approvals tile and GL Approvals Workcenter

Approvals Tile tomorrow

Admin

View ByType

All3

Journal Entry3

Pending Approvals

3 rows

Journal Entry	REVERSING ACCRUAL JOURNAL. See - 10000 / CSJT113017 / 2017-12-07 / 10000 Turbiner, Jane C.	Routed 12/07/2017
Journal Entry	REVERSING ACCRUAL JOURNAL. See - 10000 / CSJT12717A / 2017-12-07 / 10000 Turbiner, Jane C.	Routed 12/07/2017
Journal Entry	Canon and Xerox copier recharg - 10000 / CSCR1801Y / 2017-11-30 / 10000 Rhodes, Carol	Routed 12/07/2017

Cancel

Filters

Filter

Type

Journal Entry

Requester

From

Date Period

Reset

BFS is getting a facelift

Worklist is replaced by Approvals tile and GL Approvals Workcenter

GL Workcenter tomorrow

The screenshot displays the 'UC GL WorkCenter' interface. The left sidebar shows a navigation menu with 'My Work' and 'My Approvals' (containing 'Journals Pending My Approval (3)'). The main content area is titled 'Journals Pending My Approval' and includes a 'Comments' section with buttons for 'Approve', 'Deny', 'Hold', and 'Pushback'. Below this is a 'Journals' table with columns for 'Select', 'Journal ID', 'Unit', 'Date', 'Line Unit', 'Total Debits', and 'Total Credits'. The table lists three entries: CSCR1801Y, CSJT113017, and CSJT12717A. At the bottom of the table, there are 'Select All / Deselect All' buttons and another set of 'Approve', 'Deny', 'Hold', and 'Pushback' buttons. A 'Refine Filter Criteria' link is visible in the top right of the main area.

Select	Journal ID	Unit	Date	Line Unit	Total Debits	Total Credits
<input type="checkbox"/>	CSCR1801Y	10000	11/30/2017	10000	\$859.97	\$859.97
<input type="checkbox"/>	CSJT113017	10000	12/07/2017	10000	\$423,850.97	\$423,850.97
<input type="checkbox"/>	CSJT12717A	10000	12/07/2017	10000	\$423,850.97	\$423,850.97

The 'Filter Values' dialog box is shown, allowing users to refine search criteria. It includes fields for 'User ID' (012520898) and 'Filter ID' (UCGLAPPRVL GL Journal Approvals). Below these are several dropdown menus for 'Business Unit', 'Line Business Unit', 'Requester', 'Journal ID', and 'Org Node', each followed by a search icon. A 'Revert to Saved' button is located at the bottom of the filter section. At the very bottom of the dialog are 'OK', 'Cancel', and 'Apply' buttons.

BFS is getting a facelift

Changing labels and opening up single fields

Award Profile page today

Favorites

Main Menu

Grants

Awards

Award Profile

Berkeley

UNIVERSITY OF CALIFORNIA

BFSQA92

Home

Worklist

Add to Favorites

Sign out

New Window

Help

Personalize Page

Award

Funding

Resources

Certifications

Terms

Milestones

Key Words

Funding Inquiry

Award Info

Imaging

Award ID 000017

Reference Award Number D43 TW000003-21

Federal Award Identification Number

Title UCB/UCSF AIDS International Training and Research Progra

Long Description UCB/UCSF AIDS International Training and Research Program (AITRP)

189 characters remaining

Award PI Arthur Reingold

Reporting Role

Sponsor NIH Fogarty International Center

Post Award Administrator **Nenita Perth**

Purpose BARE

Status Accepted

Award Type Grant

CFDA 93.989

Proposal ID 000017

Version ID V101

Start Date 06/01/2008

End Date 08/31/2014

View Contract

View Proposal

Additional Information

Grant Administrator

Sponsor Website

Primary Project PI Arthur Reingold

Associated Project

Personalize

Find

First

1-4 of 4

Last

PC Business Unit	Project	Description
GM100	1000238	UCB/UCSF AIDS International Tr
GM100	1000239	Award 000017 TASK UGANDA PI RE
GM100	1000240	UCB/UCSF AIDS International Tr
GM100	1000241	Award 000017 TASK Viet Nam S P

Go To:

Sponsor

Protocols

Attributes

Department Credit

Notepad

Award Modifications

Supplemental Data

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Award

Funding

Resources

Certifications

Terms

Milestones

Key Words

Funding Inquiry

Award Info

Imaging

Award Profile page tomorrow

Berkeley Office of the
Vice Chancellor of Finance

Training

- Introductory video: controller.berkeley.edu/bfsupgradevideo
- FAQs on BFS webpage built from questions from testing
- Additional training: webinars between 3/29-4/6