Budget & Finance Weekly Digest

November 29, 2022 | 99th Edition

Announcements

End of the Year Concur Deadlines

With the end-of-the-year just around the corner, please make sure to review the deadlines specific for Concur submissions in the 2022-2023 Holiday Closures Blink Page. For all Travel & Entertainment reimbursements, card reconciliations, prepayments, Human Subject gift card request, cash advance requests and other Visa Gift Card requests must be submitted and have approval by **December 7** in order for expenses to post to the December ledgers. For foreign travel wire payments made through Concur, the deadline is **November 30** to be processed before the December campus closure.

Cost Transfer Workflow Enhancements to Launch on 12/1/2022!

New enhancements to Cost Transfer workflow for departments include:

- The ability to change the billable status: no need to submit a ticket anymore.
- The ability to split and transfer a cost in a single action: no need to do in 2 steps anymore!
- Please refer to ID#20 on the Chancellor's ESR FIS Advisory Committee Main Issues List for tracking purposes.

For more information, read the How to Initiate a Partial or Full Cost Transfer in Oracle PPM KBA.

2024 Physical Inventory - Equipment Management

The 2024 Physical Inventory effort will officially start on **1/1/2023**. As we have done in the past, you will receive an email notifying you of your Financial Unit's inventory validation period start and end dates. We will be following up with a random sample after your inventory period ends. You are welcome to begin your inventory prior to receiving the email, as any validation date after **7/1/2022** will be accepted. Please reach out to us if you have questions: eqm@ucsd.edu.

New Common Chart of Accounts Display Order in UCPath

Beginning in two weeks on **December 12**, UCPath is implementing a New Common Chart of Accounts (CCoA) Display Order. This project will update UCPath chartfield ordering adhering to the new UC systemwide standard.

Who will be impacted?

- The new CCoA Display Order will only impact UCPath users.
- OFC users will not be impacted. There will be no change to data entry in OFC.

Resources:

- New CCoA Display Order Micro Learning Video
- Current UCPath Order vs. New UCPath Order Diagram
- UCPath New CCoA Chartfield Definitions Diagram

For a complete description of this project along with the list of UCPath pages impacted by this change, please refer to UCPath's New CCoA Display Order Project Space.

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

Fund Management Office Hours

Every Thursday @ 11:00am - 12:00pm

At this week's office hours, we will cover a variety of **PPM Topics including Commitments, Cost Transfers, and Recharges.** Come and get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

2022 Year End Review

Wednesday, November 30, 2022

10:00am - 11:00am

There were a lot of enhancements in Travel & Expense and Procure-to-Pay which came out of 2022. Join us in reviewing those enhancements and looking forward to the year 2023 by registering today!

Travel Perks

Wednesday, November 30, 2022

11:00am
Explore the many benefits provided in UC's contracts with the major airlines, hotels and car rental companies and learn how to take advantage of them when booking travel.

Oracle: Buying and Paying for PO Requisitioners
Thursday, December 1, 2022
9:00am - 11:00am
This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, closing POs, processing nonPO payments, and checking invoice status. This course will be especially valuable for individuals responsible for departmental purchases who want to further their understanding of buying on campus.

Please note the Introduction to Oracle Procurement & Payables eCourse is a required prerequisite for registration.

Travel for Students on Study Abroad Programs
Wednesday, December 7, 2022
11:00am
UC's contract with Student Universe provides a variety of benefits to our students and we will highlight those along with the exciting Airfare Deposit Program.

Oracle: Buying and Paying for Financial Unit Approvers
Thursday, December 8, 2022
9:00am - 11:00am
This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as reviewing for and populating POETAF information during the ordering process, approving requisitions and invoices, revising orders, and checking PO invoice status. This course will be especially valuable for individuals responsible for those responsible for approving requisitions and invoices on behalf of their financial unit.

Please note the Introduction to Oracle Procurement & Payables eCourse is a required prerequisite for registration.

Reporting Workshop: Dashboard of the Week Series
Monday, December 12, 2022
11:00am - 12:00pm
Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include an interactive report demo, discussion of what questions the report can answer, opportunities to ask questions and walk through your use cases, and hear how others are using the dashboard or report. Next week's session will feature the **Default Project Payroll: Advanced Topics**. This will be our last session of the year and the series will resume in January 2023!

Oracle: Buying and Paying for PO Requisitioners
Thursday, December 15, 2022 @ 9:00am - 11:00am
This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, closing POs,

processing nonPO payments, and checking invoice status. This course will be especially valuable for individuals responsible for departmental purchases who want to further their understanding of buying on campus.

Please note the Introduction to Oracle Procurement & Payables eCourse is a required prerequisite for registration.

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**

Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer Finance-related questions.

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!

New Report Releases: Department Exceptions

1. **SP Revenue and AR Wrong Accounting – PPM**
   a. Identify Sponsored Project Awards that have an incorrect revenue or receivable account assigned to them
2. **Non-SP Projects with DFF Exceptions**
   a. This report displays the setup elements of General or Capital Projects with a fund or function that may be incorrect. Without a fund or function, costs may be posted incorrectly.
   b. Use this report to identify any tasks that are set up incorrectly and need to be closed or updated.
3. **Multiple Project Roles in Same Award/Project Space**
   a. Identify projects or awards where multiple people have been assigned to the same project role
4. **Project Task Owning Org Mismatch**
   a. Identify Projects or Tasks with wrong or potentially wrong owning organization.

New Feature: Cognos Time Stamps
All Cognos reports now feature a time stamp in PST that shows the last time data in the report was updated. Time stamps have been added to the following reports: *Faculty and Researcher Dashboard, Expanded Project Summary, Project Management Dashboard, GL Project Balances, GL - PPM Reconciliation, GL - PPM Receivables, Transaction on No Project.*

Travel & Entertainment Process in Concur

With 2023 just around the corner, here are some Blink Pages that you can reference when planning future trips and events. And for all new employees or employees who just need a refresher, the Concur Basics Blink page is a great resource to have bookmarked in your browser of choice!

The Support Framework: Your Guide to Finding Help

Learning all there is to know about budget & finance can feel daunting.

Support Framework

Not sure where to find answers? Our support framework is designed to help the Budget & Finance community, including faculty or staff with financial responsibilities, identify resources.

TIER 0 — What Can I Do On My Own?

Applies to you if you:
- Want to find published support information anytime
- Don't want to wait in line for your question to be answered
- Don't know who your department Subject Matter Experts (SME's) are

Self-Service Resources:
- Your immediate Supervisor
- Budget & Finance User Group
- Knowledge Base Articles
- Community of Practice
- Published Information in Blink
- Training Videos

TIER 1 — Where Can I Get Help?

Applies to you if you:
- Have a question that is unable to be answered by your department SME or self-service resources
- Have a question that can be quickly answered by a knowledgeable representative
- Need to process a transaction in Services & Support
  - E.g. "I need you to process/approve/route…"

Resources:
- Attend an Office Hours session
- Contact the Finance Help Line
- Submit a request ticket in Services & Support

TIER 2 — Who Can Help Escalate?

Applies to you if you:
- Are unsure how to submit your request/ticket
- Have submitted a ticket and are not receiving a response
  - Please try to give agents enough time to process your requests before escalating the ticket
- Identify something that does not seem to be working properly

Resources:
- Contact the central support team directly at financesupport@ucsd.edu
- Submit a ticket to Budget & Finance Support
- Find the form in our Request Catalog to process your transaction request

TIER 3 — How Do I Suggest Enhancements?

Applies to you if you would like to suggest:
- An enhancement to a financial system
- Idea to streamline a financial business process
- Oracle & Concur financial reporting enhancement

Resources:
- Budget & Finance Suggestion Box
- Business Analytics Hub Help Page

View the full Support Framework on Blink.

UC San Diego BUSINESS AND FINANCIAL SERVICES

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.

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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