

# Budget & Finance Weekly Digest

February 15, 2022

58th Edition

## Announcements



### Inactive Index Conversion Cleanup

Some inactive indexes in IFIS were converted to Oracle, which has impacted roll-up reports, PI reports, etc. These inactive indexes have been identified. For those in OFC still in "Active" status, the following corrective actions are being taken:

- General Projects with those indexes will be reviewed and closed on your behalf centrally
- The Sponsored Projects Finance (SPF) team will close any ended awards they are able to. Many of these projects still have balances and cannot be closed until zero.
- The Plant Accounting team will close the Capital Projects they are able to

Note: Cumulative data was required for conversion from IFIS to Oracle, so if inactive indexes were part of the larger award or capital project, those indexes were converted on purpose and might still have a purpose to exist if the overall award isn't closed out.

Please refer to issue #38 on the [Chancellor's ESR FIS Advisory Committee Main Issues List](#) for tracking purposes.

**The Finance Help Line is LIVE!**

A graphic for the UC San Diego Finance Help Line. On the left, a white background contains a blue circular icon with a yellow telephone handset, the text "UC San Diego Finance Help Line Now Live!" in bold blue font, a yellow box with the phone number "(858) 246-4237", and the "Hours of Operation" listed as "Tuesdays - Thursdays 10:00am - 12:00pm & 1:00pm - 3:00pm". On the right, a photograph shows a silver office telephone on a desk with a computer monitor in the background.



**UC San Diego  
Finance Help Line  
Now Live!**

**(858) 246-4237**

**Hours of Operation**  
Tuesdays - Thursdays  
10:00am - 12:00pm & 1:00pm - 3:00pm

Have Finance-related questions? Call the **UC San Diego Finance Help Line** at **(858) 246-4237** from **Tuesdays to Thursdays, 10:00am - 12:00pm & 1:00pm - 3:00pm**. Knowledgeable agents are standing by to assist you and answer [Finance-related questions](#). For more information on resources available to you, please refer to the [support framework outlined on Blink](#).

We thank you for your continued support!

### **Financial Accounting Program Application Period Opens This Friday!**



The Financial Accounting Program application cycle is set to open again on February 18 through March 4. The program is intended to provide fundamental accounting knowledge that can broadly be applied to the financial work done at UCSD. However, the courses do not cover UCSD specific systems training like Oracle. If you are interested in systems training, we have a library of training videos in the [Training Course Blink](#) page.

**Currently, we are looking for applicants to start in the upcoming Spring Quarter or Summer Quarter.**

For those interested, please be aware that you will need to obtain your supervisor's endorsement to complete your application. If you would like to look at the form please view it in the Application Process section of the [program Blink page](#).

For those who already applied and have yet to start the program, you should have received an email on 2/7 inquiring about your interest. If you did not receive an email and you applied during Fall 2021 or Winter 2021 and desired a Spring Quarter start, please contact [financesupport@ucsd.edu](mailto:financesupport@ucsd.edu).

Additional Spring Quarter Details:

- Acceptance into the program to start Spring Quarter will be announced on March 14.
- Spring Quarter Courses will begin the week of March 28 and conclude June 10.
- If you have any questions about the course structure (synchronous/asynchronous) or the time needed to participate in the course, refer to the program Blink page [FAQ section](#).

Thank you for your interest in the Financial Accounting Program!

### **Hot Topics: From Cost Transfers to AP Cost Corrections**

Thank you to those of you who registered for our Hot Topics session in February! Due to some additional improvements which were identified for the AP Cost Corrections, we are postponing this session. We apologize for the inconvenience and hope to see you register again once we have re-posted this event.



## Training & Support



Watch recorded office hours and more on our [UC San Diego Budget & Finance YouTube channel](#).

### **Oracle: Buying and Paying for PO Requisitioners**

**Thursday, February 17, 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.

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### **Campus Budget Office: Office Hours**

**Thursdays, 10:00am - 11:00am**

Starting February 3 until March 31, the Campus Budget Office will be hosting Office Hours to support budget preparers throughout the planning process. This week's Office Hours will have an open Q&A.

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### **Fund Management Office Hours**

**Thursdays, 11:00am - 12:00pm**

This week we will have open Q&A. Bring your questions and struggles. Nothing a fund manager does is off the table. Trying to figure out the source of a GL-PPM discrepancy? Can't figure out how to get your direct retro with cap gap to work? See a wire you need to claim but have no idea what to do next? Bring your issue to office hours and phone a friend.

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### **Concur: Event and Expense Reimbursements**

**Tuesday, February 22, 2022 @ 9:00am - 11:00am**

This live course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. Intended for preparers, hosts/payees, and financial managers who are familiar with policy and would like to learn about the expense reconciliation process in Concur.

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### **UC San Diego Travel: Before You Go**

**Thursday, February 24, 2022 @ 9:00am - 11:00am**

Faculty and staff who travel or book business travel can further their understanding of preauthorization, booking travel via Concur, prepaying with the Travel & Entertainment Card, and how to take advantage of TripIt Pro. It is recommended that you also attend the *UC San Diego Travel: Reporting Expenses* course before your trip concludes.

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### **UC San Diego Travel: Reporting Expenses**

**Thursday, February 24, 2022 @ 1:00pm - 3:00pm**

This course provides an overview of UC San Diego travel policy and the trip reconciliation procedure, including summarized guidelines and on-demand resources. Faculty and staff will learn about the Concur processes for reporting travel expenses on a Travel Expense Report.

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!

# Tips & Tricks

## How to Create and Reconcile Travel Prepayments in Concur

[Take a look at our new KBA](#) to learn more about creating and reconciling a prepayment to a non-employee Travel supplier in Concur.

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](#).

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