The Support Framework: Your Guide to Finding Help

Entertainment Process

Has it been a while since you have hosted business events and reconciled entertainment expenses? Review the knowledge of policies and processes. As departments get ready to plan business travel, university events and business meals, take a moment to refresh your Travel and Entertainment Processes.

The Support Framework is designed to help the Budget & Finance community, including faculty or staff with financial responsibilities. This framework is intended to provide an overview of our services, pinpoint key resources based on the following questions:

Who can I contact to obtain an overview and checklist of the business travel lifecycle? If you are new or an infrequent traveler, please contact the UC San Diego Budget & Finance Travel Office. Travelers and preparers also attend the Concur: Event and Expense Reimbursements course before the trip concludes.

How do I prepare for a Travel Expense Report? This course provides an overview of UC San Diego travel policy and the trip reconciliation procedure, including summarized requirements. This virtual training is set to occur every 2nd (second) Tuesday of the month, starting July 12, 2022.

Where can I learn about Concur processes related to meetings, entertainment, and business travel? This live course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business travel. Register for this comprehensive training course providing instruction on contract, event, and invoice creation and 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.

What are the Core Fund Resource Allocations Survey Results? Thank you for your participation in the Core Resource Allocation survey last month. There were 104 respondents from 8 different VC areas. 79% of respondents indicated a preference for an annual lump sum allocation. The Campus Budget Office plans to implement this change in the coming months.

How do I contact UC San Diego Finance Help Line? Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer questions. Our goal is to deliver timely information that matters to you.

Travel Process

Do you need help preparing a Travel Expense Report? Please visit the Finance-related Announcements page on the UC San Diego Budget & Finance YouTube channel for various announcements.

Entertainment Policy

Who can suggest enhancements or help escalate issues? Please feel free to contact CBO via the Services & Support Request Forms Blink page for all non-taxable items. For a review of when to use the different request forms in Oracle Procurement, you may review the New Oracle Procurement Request Form.

Contract, Event, and Invoice Creation

What are the PPM Contract and Invoice Training Office Hours? Starting July 12, 2022, representatives from the Office of Contract and Grant Administration (OCGA) will demo the Project Setup to GL Match Errors report and get your questions answered each week.

Invoice 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.

Contract, Event, and Invoice Creation

What are the PPM Contract and Invoice Training Office Hours? Starting Tuesday, July 12, 2022 @ 9:00am - 11:00am, representatives from the Office of Contract and Grant Administration (OCGA) will demo the Project Setup to GL Match Errors report and get your questions answered each week.

Oracle Procurement & Payables

What are the Introduction to Oracle Procurement & Payables eCourse Office Hours? 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, and will reoccur on 08/09, 09/13, 10/11, 11/08.

Invoices, Records, and Reimbursements

When do we have the next Virtual Instructor-Led Training Class? This Workshop will provide an overview of policies and processes. The workshop will be recorded and available on our UC San Diego Budget & Finance YouTube channel for those who are unable to attend.

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Tips & Tricks

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Budget & Finance Weekly Digest

What are the July Virtual Instructor-Led Training Classes? These courses are designed to help the Budget & Finance community, including faculty or staff with financial responsibilities. Each Tuesday, the Weekly Digest provides important updates related to our services, pinpoint key resources based on the following questions:

- Who can I contact to obtain an overview and checklist of the business travel lifecycle? If you are new or an infrequent traveler, please contact the UC San Diego Budget & Finance Travel Office. Travelers and preparers also attend the Concur: Event and Expense Reimbursements course before the trip concludes.
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