Announcements

The following evaluations were conducted over the past few months:

- Most were largely satisfied with the training provided this year.
- The feedback presented broad themes we will explore for further User Acceptance Testing.

Some key takeaways from these evaluations include:

- The course provides an overview of UC San Diego travel policy and procedure, including summarized guidelines, resources, preparers (Concur Delegates) and approvers.
- The course is designed to help the Budget & Finance community, including faculty or staff with financial requirements.

Hot Topics: Fiscal Close

- The course will cover the process of certifying and generating expense report(s) for requesting employee reimbursements for business expenses.
- Intended for preparers, the course will explain how to use the Travel & Entertainment Card (T&E) and how to complete online transactions.
- It is crucial that the new employee is fully aware of what expenses are allowable and this is determined by their job title code.

More information can be found on the Blink page.

Fund Management Office Hours

- The course will cover how to book travel via Concur Travel.
- You will learn how to submit event payment requests and employee reimbursements via Concur.
- You will also learn how to view and reconcile Travel & Entertainment card transactions.
- The course will cover the process of certifying effort for fiscal years 2021, 2022 and the first half of 2023.

PaymentWorks Blink Page

- The course will cover how to complete online transactions.
- It is important to note that new payee invitations or modifying existing registration will need to be completed on the Blink page, and you can search by project, task or person.

BI & Financial Reporting: New Enhancements

- The course will cover the production of the Transaction Details Report.
- The course will cover how to use the Concur Travel terminology and concepts.

BI & Financial Reporting – Non-Production Environment

- The course will cover how to use the Concur Travel terminology and concepts.
- The course will cover how to use the Concur Travel terminology and concepts.

BI & Financial Reporting: New Enhancements

- The course will cover how to use the Concur Travel terminology and concepts.
- The course will cover how to use the Concur Travel terminology and concepts.

BI & Financial Reporting – Non-Production Environment

- The course will cover how to use the Concur Travel terminology and concepts.
- The course will cover how to use the Concur Travel terminology and concepts.

Additional Resources

- For more information including training resources, please see the BI & Financial Reporting section of the weekly digest to view more details about the enhancements now in production.

Other Important Information

- The following enhancements have been made to the Faculty and Researcher Dashboard:
  - New column added on the Contract Invoice and Payment Report for bill-through date.

Future Events

- The following events are scheduled:
  - UC San Diego Travel: Reporting Expenses: Thursday, April 13 @ 9:00am - 11:00am
  - UC San Diego Travel: Before You Go: Thursday, April 20 @ 9:00am - 11:00am
  - Reporting Workshop: Dashboard of the Week Series: Thursday, April 27 @ 9:00am - 11:00am

PaymentWorks Launched!

- This issue is only affecting a handful of contracts (ca. 10 contracts). If you find that the system has not generated a "draft" paychecks, please see the BI & Financial Reporting section of the weekly digest to view more details about the enhancements now in production.

Fiscal Close

- There is a desire for additional real-world use cases and examples in the training we provide, as well as different types of project and task types.

Additional Resources

- The following resources are available:
  - Important Information for Move/Relocation Coordinators
  - New Fin Unit L2 (Entity Code) prompt
  - New alternate view for payroll page grouped by project and task, and then by person
  - AM-560 Moving Expenses for Academic Appointees

Please note that new payee invitations or modifying existing registration will need to be completed on the Blink page, and you can search by project, task or person.

More information can be found on the Blink page.