Budget & Finance Weekly Digest

November 15, 2022 | 97th Edition

Announcements

New Major BI & Financial Reporting Enhancements!
Major enhancements have been made to the Transaction Details Report, Expanded Project Summary Report, and the Faculty and Researcher Dashboard. See the BI & Financial Reporting section below for more detailed information.

New Balboa Travel Fee Structure
UC San Diego and Balboa Travel have initiated a new service fee structure that better reflects Balboa Travel's dedication and commitment to UC San Diego while balancing travel industry cost increases and vendor imposed fees.

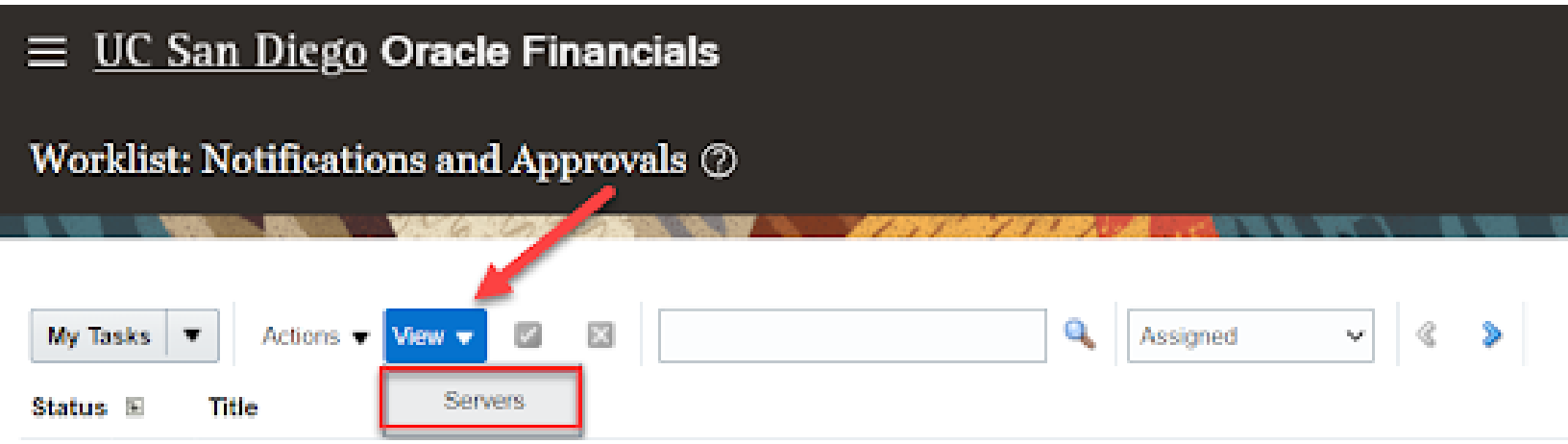
- The new fee structure with Balboa remains well below industry standard, where a typical booking fee ranges from $50-$100 per transaction.
- Our fees are also consistently below prices paid at other UC campuses.
- Balboa Travel provides valuable services to our UC travelers, such as trip advisement and monitoring, management of unused tickets, Covid resource considerations, technology integration and maintenance with UCoP's Risk Management, and proactive assistance when travelers need it most.

When it's time to travel, remember to travel the Triton way!

Payroll Deadline: Move/Relocation Expense Reports
The end of the year Move/Relocation deadline for monthly/bi-weekly paid employees has passed. Any expense reports that are currently pending approval or any new Move/Relocation expense reports that get submitted will get approved in January 2023.

PPM Recurring Billing Feature Launched 11/14/22!
Recurring billing allows users to set up a contract in Oracle for invoices to automatically generate per a designated Bill Cycle frequency. For more information, read the [How to Set Up PPM Recurring Billing KBA](#).

Reminder: Worklist Setting
Reminder to all approvers that you can expand the number notifications that appear in your Worklist by opening the servers menu in the view dropdown and increasing the maximum tasks up to 30.



IPPS Office Hours
Canceled on November 23
Due to the Thanksgiving holiday, IPPS will not be hosting office hours on Wednesday, November 23. Please feel free to instead attend on Monday, November 21 or the following week. Enjoy the holiday break!

Internal Controls Office Hours
Canceled on November 23
Please note that internal controls office hours will not be held on Wednesday, November 23. If you have any questions or comments on internal controls, OFC roles or access, then please join the following week's session on Wednesday, November 30 at 10:00am.

Recycled Paper Outage
Due to a paper mill fire, recycled paper will not be available for the foreseeable future. While there is still some stock available, you will see these items begin to disappear from the catalog. Please refer to our list of comparable paper for alternatives.

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

Internal Controls Office Hours
Every Wednesday
10:00am - 10:30am
Join the Internal Controls Office Hours to ask questions regarding the internal controls guidance posted on the Best Practices in Internal Controls Blink page.

Fund Management Office Hours
Every Thursday
11:00am - 12:00pm
At this week's office hours, we will host a demo on our recent enhancements on the Transaction Details Report and Expanded Project Summary Report. Come and get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

Oracle: Buying and Paying for PO Requisitioners
Thursday, November 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.

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

UC San Diego Travel: Before You Go
Thursday, November 17, 2022
9:00am - 11:00am
The course will include an in-depth explanation of topics covered in the Concur Travel and Expense eCourse. This course will be especially valuable for employees who travel or book business travel and want to further their understanding of travel preauthorization and UC San Diego's instance of Concur Travel booking tool. Intended for travel arrangers, delegates, travelers, and financial managers who are familiar with Travel Policy G-28 and would like to learn about more advanced Concur Travel terminology and concepts.

UC San Diego Travel: Reporting Expenses

Thursday, November 17, 2022

1:00pm - 3:00pm

Intended for: Those involved in the process of trip reconciliation for business travel at UC San Diego, including travelers, preparers (Concur Delegates) and approvers. The course provides an overview of UC San Diego travel policy and procedure, including summarized guidelines, resources, and information about online tools. In this course, you will learn about Concur processes for prepaying travel and claiming expenses after the business trip occurs in accordance to Travel Policy G-28.

Financial Operations Office Hours

Friday, November 18, 2022

9:00am - 10:00am

Join the Financial Operations team this Friday for updates on General Projects Contract Billing, IPPM - Cost Transfer workflow, Cash & Merchant Services, and Accounts Receivable, followed by a demo of Cost Reimbursable Billing and an open Q&A. We look forward to seeing you there!

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.

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.

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 Enhancement Release: Transaction Details Report
The following changes are now live on the Transaction Details Report:

1. Addition of PPM Cost Transactions *Condensed* tab
2. Addition of PPM Commitment Details tab
3. Ability to choose which reports you want to see (there are four total reports now)
4. New fields and drill-thrus including:
    1. PPM Cost Transactions: Approver, Created by, Contact Person for Recharges, Project Manager, transferred to project-task, transferred from transaction number, adjusted transaction number, reversal transaction number, transferred to transaction number,
    2. GL Transactions: Posting Date, drill-thru to DOPES
5. Changes to prompts:
    1. Multi-select on PI/PM/TM
    2. New Expenditure Batch Code - Use this to view batches in GL Transactions (instead of transaction number)
    3. New Expenditure Comment prompt - Use this when you don't have a transaction number, but have some details about the expense that may be used in the expenditure comments. For example:
        1. Payables transactions - search by the item name, description of the item, name of person reimbursed
        2. Receivables transactions - search by case number or other description for cash deposit requests
        3. Recharge transactions - if the recharging unit is utilizing expenditure comments, use the description to search for a particular recharge
        4. ISIS Transactions - search by student PID
    4. New Customer prompt

For a demo of these enhancements, join us for Fund Manager Office Hours on Thursday, November 17!

New Enhancement Release: Expanded Project Summary Report
The following changes are now live on the Expanded Project Summary Report:

- More flexibility for end users by being able to select how you want to see summary and expenditure by month data
- Multiple tasks can be selected within a project
- A new unapproved requisitions table has been added

New Enhancement Release: Faculty and Researcher Dashboard
Expenditure comments with URLs are now hyperlinked in the Faculty and Researcher Dashboard Report.

We would like to thank the following individuals for submitting enhancement requests:
Irene Xavier, Heather Sears, Elaine Stowers, Kelley Wilson, Kinuko Kanda, Lauryn Philbrick, Chelsea Van Pelt, Becky Uhl, Glenn Saunders, Liesl Johnson, Matt Frankos, Lindsay Root, Kristen Walker, Brandi Pate, Kattareeya Morrow, Jared Wright, Jessica Respicio, Nancy Herbst, Nickolaus Lekovish, Charlene Mendoza, Jillian Kochan, Michele Palmer, Karen Riggs-Saberton

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

Manage your preferences | Opt Out using TrueRemove™
Got this as a forward? Sign up to receive our future emails.
View this email online.

9500 Gilman Dr, | La Jolla, CA 92093 US

This email was sent to .
To continue receiving our emails, add us to your address book.

Subscribe to our email list.