

August 22, 2023 | 135th Edition



Event Schedule Available for Research Administrator Appreciation Day + Fund Manager Summit 2023



The Research Administrator Appreciation Day and Fund Manager Summit event is less than a month away on September 12 and 13. Our planning team has been working diligently to plan an exciting two-day experience for our attendees. The event schedule is now live on our website.

All attendees will receive a gift plus several chances to win amazing raffle prizes throughout the event. Register today to reserve your spot. Registration officially closes on September 5. We can't wait to thank you in person for your valuable contributions on September 12!

Travel & Entertainment (T&E) Blink Home Page and Content

Please note that updates have been made to the T&E Blink home page and content to align with other UC San Diego web pages. While the T&E Home page, which is accessible under the Budget & Finance menu, now has a different look, all of the key content is still available at your fingertips.

The main difference is that there is no longer a gray navigation bar to the left, however, all topics can still be accessed under the **Important Links** section as you scroll down the T&E home page

Most of the information can also be searched via the “Search Blink” field on the top right of any Blink page. Additionally, note that a new Travel Program Benefits page has been published which highlights the benefits of booking travel through Concur and the travel program.

Financial Accounting Program Application Deadline: 8/28/2023
The UC San Diego Financial Accounting Program is a complementary professional development opportunity being offered to help you become more effective in your role. This program is currently offered at no cost to eligible career employees through the end of the fiscal year (Spring 2024)!

Take the short assessment and APPLY NOW. An application including the assessment and supervisor endorsement is due **August 28, 2023**. You are encouraged to share this information with your teams, colleagues, and those who may be interested in participating in the full program or Financial Accounting for Non-Accountants (FAFNA) as a standalone course.

We appreciate the partnership with UC San Diego Division of Extended Studies and the support from supervisors across campus and health sciences.



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

ECERT Effort Reporting Office Hours
Every Wednesday @ 2:30pm - 3:30pm
Come get your questions answered, system access setups, or helpful hints on the effort report certification process.

Fund Management Office Hours
Every Thursday @ 11:00am - 12:00pm
At this week’s office hours, we will cover two exciting topics:

- Project Notes are coming to a report near you! Upcoming releases of the Faculty and Researcher Dashboard and the Expanded Project Summary will include a box for project notes. At this office hours, we will show you the correct way to enter project notes in Oracle so that they appear as intended on reports.
- Cognos Analytics, the reporting tool for many of your favorite reports, is being upgraded on August 25. While the basics of running and viewing reports haven’t changed, there are some minor changes coming to the ways you interact with reports after they are run. At this

office hours, we will demo the changes to how you will interact with reports in the new version.

UC San Diego Travel: Before You Go

Thursday, August 24 @ 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.

Topics Covered:

- Review the process to request travel preauthorization via Concur Request
- Be able to request a new University Travel & Entertainment Card
- Learn how to book travel via Concur Travel

UC San Diego Travel: Reporting Expenses

Thursday, August 24 @ 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 with Travel Policy G-28.

Topics Covered:

- Arranging for prepayment of fees, such as registration
- Making deposits, such as for hotels
- Reporting expenses
- Claiming traveler reimbursement

IPPS Hot Topics: Move/Relocation Policy & Procedures

Wednesday, August 30 @ 10:00am

This Hot Topics Training is great for department Move Coordinators who are in charge of assisting new employees with their Move/Relocation expenses. You will learn about the different move policies, how to find out which policy applies to your employee, reimbursable expenses versus non-reimbursable, the process in Concur to reimburse the employee/reconcile card charges, the taxability component associated with these expenses.

Contract and Invoice Creation Training

Wednesday, August 30 @ 10:00am - 11:00am

Find out about the PPM contract and invoice process. These resources and training are for individuals new to UC San Diego or those interested in refreshing their knowledge of the PPM contract and invoice process.

Internal Controls & Accounting Office Hours

Wednesday, August 30 @ 1:00pm - 2:00pm

Join our Internal Controls & Accounting team for office hours the last Wednesday of each month as a platform for discussion related to General Ledger related transactions, Intercampus Recharges, and Payroll reconciliation. The ICA team will provide any updates available and the session will be open for Q&A.

Reporting 1:1 Sessions

Sign up for a 1:1 Zoom session to meet with a member of the BI & Financial Reporting team who can answer your specific questions about financial reporting and dashboards/panoramas in the Business Analytics Hub (BAH).

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!

The Support Framework: Your Guide to Finding Help

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

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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