Budget & Finance Weekly Digest

May 23, 2023 | 122nd Edition

Announcements

Oracle Fixed Assets Module Office Hours

Beginning in June, the Oracle Fixed Assets (FA) Project team will kick off a series of office hours to discuss various topics and answer questions surrounding asset related business processes and project updates. These sessions will be held on **Mondays at 10:05 am** beginning **June 5, 2023**. The following schedule and agenda for each session can be found on the FA Implementation project page.

The week prior to each session a reminder will be included in the Budget & Finance Weekly Digest, along with a link to access the session.

Topics	Dates
• FA Roles/Access • CAMS vs FA Interaction • Conversion	• June 5, 2023 - 10:05 AM • July 17, 2023 - 10:05 AM • August 14, 2023 - 10:05 AM
• Purchasing Equipment • Fabrications/Trade Ins	• June 12, 2023 - 10:05 AM • July 24, 2023 - 10:05 AM • August 21, 2023 - 10:05 AM
• Accounting • Reporting	• June 26, 2023 - 10:05 AM • July 31, 2023 - 10:05 AM • August 28, 2023 - 10:05 AM
• Cost Transfers • Expenditure Type Corrections	• July 10, 2023 - 10:05 AM • August 7, 2023 - 10:05 AM • September 11, 2023 - 10:05 AM

Need an Invoice from Concur or Balboa?
Use this link to Balboa Travel's document database where travelers and admins can retrieve historical invoices. Using this link is fast and easy, no need to contact an agent and no additional service fee!

Need an Invoice copy? Click Here!

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

Fiscal Close Office Hours
Every Wednesday @ 10:00am - 10:30am
From now until August 2nd, join the Fiscal Close Office Hours to ask questions and provide feedback regarding fiscal close activities.

Understanding UC's Car Rental Rates
Wednesday, May 24th @ 11:00am

This session will go over our car rental program, what that means and how to take advantage of it for personal travel. Melissa Burley (UC Risk Services) will join us to share information on insurance coverage for business rentals.

Oracle: Buying and Paying for PO Requisitioners

Thursday, May 25 @ 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.

Fund Management Office Hours

Every Thursday @ 11:00am - 12:00pm

This week will feature an overview of concur reports in BAH. Come get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

Contract and Invoice Creation Training Relaunch

Wednesday, May 31 @ 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.

Reporting Workshop: Dashboard of the Week Series

Monday, June 5 @ 11:00am

Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include discussions and report demos to help address some of your frequently asked questions. There may also be opportunities to win prizes during the series! The next session will feature the **Transactions on No Project report** on How to identify and resolve GL transactions on no project.

Mixing Business with Personal Travel

Wednesday, June 7 @ 11:00am

Mixing business with personal can be a sustainable way to travel, so we will share some tips on how to do so without using any UC funds.

Reporting 1:1 Sessions

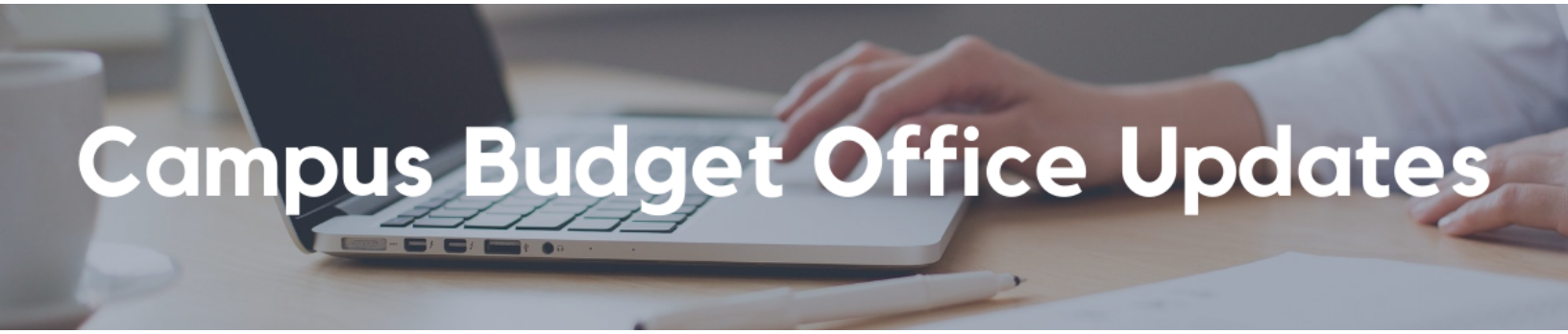
Sign up for a 1:1 Zoom session to meet with a member of the BI & Financial Reporting team who can answer your specific questions about financial reporting and dashboards/panoramas in the Business Analytics Hub (BAH).

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!



Thank you for completing the FY24 EPBCS Budget Process Survey!
The survey closed on Friday May 19th and if you participated you were entered to win one of four $25 VISA cards. Using a random name selector, the winners are:

- Kathryn Herrera (kherrera@ucsd.edu)
- Faisal Ali (f7ali@ucsd.edu)
- Karen Nguyen (khn032@health.ucsd.edu)
- Douglas Carlone (dcarlone@ucsd.edu)

We will be reaching out to the winners this week to deliver the gift cards, but we also want to thank all of you who participated in the survey. Your feedback is invaluable as we work to improve the campus budget process. Thank you again for your partnership, and congratulations to our winners!

Key Reminders When Submitting a Travel Expense Report

Here is a checklist with helpful reminders on key requirements for Travel Expense Reports. We recommend that you download the checklist and/or bookmark it in your browser of choice so that you keep it handy when creating and submitting travel expense reports. You can also find this checklist linked in these Blink pages: General Information, Concur Basics, & Travel Process.

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.

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

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.