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.

This course is intended for those involved in the process of trip reconciliation for business travel at UC San Diego, including travelers, preparers (Concur Delegates) and approvers.

### Topics Covered:
- Concur Travel terminology and concepts.
- Meeting & event terminology and concepts.
- Business expenses terminology and concepts.

### Schedule:

**Thursday, September 15, 2022 @ 9:00am - 11:00am**

**Concur: Event & Expense Reimbursements**

This 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 policy and procedure. Also, those who previously utilized MyPayments expense reimbursements. This course will be especially valuable for employees who host meetings and events and want to further their understanding of the expense reconciliation process via Concur. Also, those who previously utilized MyPayments expense reimbursements.

**Wednesday, September 7, 2022 @ 8:30am - 9:30am**

**Equipment Asset Management Office Hours**

We invite you to attend the Equipment Management Office Hours to learn how to Dispose of equipment when it is no longer of use to your department or broken. Join us to learn more about equipment life-cycle management, ask questions and share tips and tricks for report consumers. Come learn how to create a linked copy (aka view) of a report, personalize your linked copy, manage your linked copy, and get tips on how to use your linked copy. In this office hour, special guest Sarah Parnell from ITS Business Intelligence and Analytics will show some Cognos BI techniques, including how to convert a report, schedule your linked copy and more. We ask that you attend this office hour in advance of the next Bi-Weekly IT Services & Support Office Hours.

**Every Monday**

**Internal Controls Office Hours**

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

**Every Thursday**

**Instructor-Led Training Sessions**

Register for the upcoming comprehensive training course providing instruction on contract, event, and invoice creation and approval. This virtual training is set to occur every 2nd Tuesday of the month at 10:00am. The next session is 09/13, and will reoccur on 10/11 and 11/08.

**Tuesday, September 13, 2022 @ 10:00am - 11:00am**

**PPM Contract and Invoice Training**

This training will cover how to use the PPM Contract and Invoice Training website to create, modify, and delete contracts and invoices. Participants will also learn basic contract and invoice approval workflows. This training is open to anyone, but is intended for people who create contracts, approve invoices, or manage contracts and invoices. If you have any questions about this course or about contracts and invoices, please reach out to Tammy Pally, Tammy.Pally@ucsd.edu.

**Thursday, September 22, 2022 @ 1:00pm - 3:00pm**

**UC San Diego Travel: Reporting Expenses**

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.

### Schedule:

**Thursday, September 22, 2022 @ 1:00pm - 3:00pm**

**UC San Diego Travel: Reporting Expenses**

This course is intended for those involved in the process of trip reconciliation for business travel at UC San Diego, including travelers, preparers (Concur Delegates) and approvers.

### Topics Covered:
- Learn how to book travel via Concur Travel
- Be able to request a new University Travel & Entertainment Card
- Review the process to request travel preauthorization via Concur Request
- Be able to view and reconcile Travel & Entertainment card transactions
- Review the process to submit event vendor payments
- Learn how to submit event payment requests and employee reimbursements via Concur
- Be sure to try out the different calendar views in the upper right corner!

### Support Framework:

**The Support Framework: Your Guide to Finding Help**

**List View Now Available in BAH!**

List View is now available in BAH. Here’s a BAH support tip to make your life easier. To switch to List View, simply type “List View” in the Search BAH box located at the top of any BAH space, including Budget & Finance. Search BAH offers instant results and enables you to filter on any data element.

### Tips & Tricks:

- **How to Manage a Move Trip KBA**
  - To access this KBA, go to the "How to Manage a Move Trip KBA" page from the "How to Manage a Move Trip KBA" page.

### Questions? Please submit a help request via the Finance-related questions? Call the UC San Diego Finance Help Line.

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

### Bi & Financial Reporting:

**BI & Financial Reporting**

- **How to copy, schedule your linked copy and more.**
  - Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel.

### Services & Support:

**Services & Support**

- **How to copy, schedule your linked copy and more.**
  - Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel.

### Best Practices:

**Best Practices**

- **How to copy, schedule your linked copy and more.**
  - Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel.

### Policies & Procedures:

**Policies & Procedures**

- **How to copy, schedule your linked copy and more.**
  - Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel.

### Resources:

**Resources**

- **How to copy, schedule your linked copy and more.**
  - Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel.
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

Manage your preferences | Opt Out using TrueRemove™

Got this as a forward? Sign up to receive our future emails.

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.