

# Budget & Finance Weekly Digest

September 6, 2022 | 87th Edition

## Announcements



### Deadline for Submitting Taxable Travel/Move Expense Reports

Due to payroll reporting deadlines, Expense Reports for employee moves, or trips including taxable payments/reimbursements, must be completed with required attachments and approved by the Financial Unit Approver by **October 17**. Expense Reports with taxable expenses that are submitted after the deadline will be processed for payment in January 2023. For instructions on the move process in Concur, please review the [How to Manage a Move Trip KBA](#).

Questions? Please submit a [Services & Support](#) case and select "Travel Moves" in the More Specifically category.

## Training & Support



Watch recorded office hours and more on our [UC San Diego Budget & Finance YouTube channel](#).

## **Internal Controls Office Hours**

**Every Monday**

**11:00am - 12:00pm**

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, special guest Sarah Parnell from ITS Business Intelligence and Analytics will show some Cognos tips and tricks for report consumers. Come learn how to create a linked copy (aka view) of a report, personalize your linked copy, schedule your linked copy and more.

---

## **Equipment Asset Management Office Hours**

**Wednesday, September 7, 2022**

**8:30am - 9:30am**

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 your ideas to help us serve you better.

## **PPM Contract and Invoice Training**

**Tuesday, September 13, 2022**

**10:00am - 11:00am**

Register for the upcoming comprehensive training course providing instruction on contract, event, and invoice creation and requirements. 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.

Use [this link](#) to register for the next webinar on 09/13 at 10:00am.

---

## **Concur: Event & Expense Reimbursements**

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

The course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business 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 for requesting employee reimbursements for business expenses may attend this course. Intended for preparers, meeting/event hosts, financial managers, and entertainment approvers who are familiar with Entertainment Policy BUS-79 and would like to learn about more advanced meetings and entertainment terminology and concepts.

Topics Covered:

- Learn how to submit event payment requests and employee reimbursements via Concur
  - Review the process to submit event vendor payments
  - Be able to view and reconcile Travel & Entertainment card transactions
-

## UC San Diego Travel: Before You Go

Thursday, September 22, 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.

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, September 22, 2022

1:00pm - 3:00pm

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.

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



**Have Finance-related questions?**  
Call the UC San Diego Finance Help Line.

**( 8 5 8 ) 2 4 6 - 4 2 3 7**

**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!*

# BI & Financial Reporting

List View Now Available in BAH!

BUSINESS ANALYTICS HUB

UC San Diego

Budget & Finance HR/Payroll Research Student Help



HOME / Budget & Finance

## Budget & Finance

[Card View](#)

[Make a Request](#)

[Ask Question / Report Issue](#)

[Request Access](#)

*Unable to load requested view? Limited report functionality? [Click here](#) to see definitions of these and other common Cognos errors.*

Show 25 entries

Search:

Report Title	Category	Details
Accounts Receivable Panorama	Receivables & Cash Operations Panoramas	<a href="#">View Details</a>
Athletics Expense Reports	Department Panoramas	<a href="#">View Details</a>
Athletics Revenue Reports	Department Panoramas	<a href="#">View Details</a>
Budget & Financial Management Reports Panorama	Budget & Financial Management Reports Panoramas	<a href="#">View Details</a>
Campus User Roles	Administration Panoramas	<a href="#">View Details</a>
Capital Equipment Management Report	Procure to Pay Panoramas	<a href="#">View Details</a>
Capital Project Panorama	Department Panoramas	<a href="#">View Details</a>
Cellular Report	Projects & Awards Panoramas	<a href="#">View Details</a>
Central Office Exceptions Panorama	Central Office Panoramas	<a href="#">View Details</a>
Chart of Accounts Panorama	General Ledger & Account Info. Panoramas	<a href="#">View Details</a>

The [Business Analytics Hub](#) (BAH) now offers the ability to view dashboards and reports in a List View. Easily toggle between the original Card View and List View using the link near the top of any BAH space, including Budget & Finance.

# Tips & Tricks

## 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 [finance.support@ucsd.edu](mailto:finance.support@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  
BUDGET AND FINANCE 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.