

# Budget & Finance Weekly Digest

May 17, 2022

71st Edition

## Getting Ready for Fiscal Close

### Limited-Edition Newsletter Launch: The Fiscal Close Bulletin

We are excited to announce the launch of the Budget & Finance Fiscal Close Bulletin, a limited-edition newsletter issued from May to July to provide you with weekly updates and guidance related to Fiscal Close. [View the second edition here!](#)

Timely updates will be posted on the [Fiscal Close Updates Blink page](#).

## Announcements



### Inactive Index Conversion Cleanup Update

In the [02/15/22 Digest](#), we reported that General Projects in OFC with inactive indexes would be reviewed and closed on your behalf. The process was completed last night. However, there were reports of projects that departments did **not** want closed, and had impacts on Travel, Maximo, Requisitions, and more. We are **rolling back this change** and the Chancellor's ESR FIS Advisory Committee will re-evaluate this issue.

Please refer to issue #38 on the [Chancellor's ESR FIS Advisory Committee Main Issues List](#) for tracking purposes.

### Concur Enhancement: Financial Unit Approver View Update

Integrated Procure-to-Pay Solutions launched a Concur enhancement that will make your job easier when reviewing expense reports that are allocated (split-funded) to multiple Financial Unit Approvers!

- With the latest update, **split-funded reports will only show the expenses allocated to the Financial Unit you are an Approver for** - eliminating the “clutter” and simplifying your calculations.
- To help you navigate this new enhancement, we have updated the [How to Perform Tasks as an Approver in Concur Knowledge Base Article](#) (KBA) with **new** screenshots and additional guidance.

Thank you to our campus community & IPPS Advisory Committee for continuing to provide valuable and actionable feedback via [Services & Support](#) and during [Office Hours](#).



### Reminder!

#### The Campus Budget Office wants your feedback!

Please answer this 5 minute survey to tell us about your experience with managing Core Resource allocations in the General Ledger. The survey will close today on **Tuesday, May 17, 2022**.

[Take the Survey here!](#)

#### IPPS Advisory Committee Interest Form

We are opening up our IPPS Advisory Committee (IAC) to evaluate membership for the next fiscal year. This committee, attended by several IPPS representatives including our Directors of Procurement and Disbursements/Travel, was originally established to work through ESR changes, enhancements and roadblocks. The committee meets every other Friday, 11:00am - 11:45am. IPPS uses this time for:

- Working through enhancement ideas
- Discussing problems or roadblocks we're experiencing and potential solutions
- Previewing upcoming developments before they're launched
- Reviewing complicated situations surfaced by IAC members which we either work out in the moment or follow-up with resolution after the meeting.

Membership in the IAC is a year-long tenure where members are asked to actively engage in discussions, bring a positive solution-oriented attitude, and participate in posting in the Teams Community of Practice. Occasionally, you might join focus groups or be asked to help us with escalated client issues that we're having difficulty navigating. If you have interest in being a part of this committee, please [fill out our interest form](#) by **May 31**.

#### VWR Oracle Content Update

In an effort to reduce invoice errors and expedite payments the VWR hosted catalog will be turned off on **Friday, May 20**. This means Oracle search results will no longer display VWR products. Products will only be available for search via the VWR punchout. Items may also be ordered using the Goods - One-Time Shipment form.

- Due to supply chain issues VWR has been unable to maintain an up-to-date catalog resulting in mis-matched orders/invoices.
  - These errors stop for manual review and input from the requisitioner which significantly slows the process and increases workload for everyone.
  - IPPS will continue working with VWR to find further improvements in this process.
- The VWR punch-out will not be impacted by this change.



# Training & Support

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

## **Fund Management Office Hours**

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

This week we will have open Q&A. Bring your questions and struggles. Nothing a fund manager does is off the table. Trying to figure out the source of a GL-PPM discrepancy? Can't figure out how to get your direct retro with cap gap to work? See a wire you need to claim but have no idea what to do next? Bring your issue to office hours and phone a friend.

---

## **Oracle: Buying and Paying for PO Requisitioners**

**Thursday, May 19, 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.

---

## **Financial Operations Office Hours**

**Friday, May 20, 2022**

**9:00am - 10:00am**

This week's office hours will give a preview of exciting new functionality for campus, launching on June 1! We will also have time for a general Q&A session. We look forward to seeing you there!

## **Travel Booking**

**Wednesday, May 25, 2022**

**1:00pm - 2:00pm**

Join IPPS for its next Hot Topics Session! Learn how to book travel the Triton way, including the benefits of booking with Concur, Balboa, and Kahala.



**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

## Faculty & Researcher Dashboard Payroll Projections

Several enhancements and bug fixes related to payroll projections have been released into production.

- Effort percentages are now shown for each projected month. The report was previously displaying a single average effort percentage for all months.
- Because addition of the effort percentage for each month can make the Payroll Projection Details table very wide, the table has been moved to a second tab on all of the drill-through reports.
- Bug fixes related to the indirect cost calculation, benefits, and inclusion of NGN and/or GAEL have been implemented.

Many thanks to the several people who submitted tickets to make us aware of issues related to payroll projections.

# 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 Find Answers?**
  - 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
  - Resources:**
    - Attend an Office Hours session
    - Contact the Finance Help Line
    - Submit a request ticket in Services & Support
- TIER 2: Where Do I Go to Submit a Request?**
  - Applies to you if you:**
    - Have a question that is unable to be answered in Tier 1
      - These questions typically require research
      - Need to process a transaction in Services & Support
        - E.g. "I need you to process/approve/route..."
    - Identify something that does not seem to be working properly
  - Resources:**
    - Find the form in our Request Catalog to process your transaction request
- TIER 3: Where Do I Go to Request an Enhancement?**
  - Applies to you if you require:**
    - Report or System Enhancements including:
      - Advanced Configuration
      - Security Administration
      - Functional Integration
  - Resources:**
    - Enhancement Request Form
    - 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 **find answers**?
- Where do I go to **submit a request**?
- Where do I go to **submit an enhancement or idea**?

[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.  
View this email [online](#).

This email was sent to .

*To continue receiving our emails, add us to your address book.*