

Budget & Finance Weekly Digest

January 23rd, 2024 | 155th Edition

Announcements



Oracle Guided Learning Launching February 2024!

We are thrilled to announce that Oracle Guided Learning (OGL) will be implemented at UC San Diego. This innovative tool offers a user experience similar to WalkMe, with the advantage of being accessible to all OFC users upon login. Providing you with access to live, guided support as you navigate through tasks and activities in OFC. Think of it as your virtual assistant, ready to provide the assistance you need, whenever you need it.

In December 2023, UC San Diego decommissioned WalkMe. However, we are pleased to announce that WalkMe in Concur will remain accessible through the end of this fiscal year. In addition to the WalkMe guidance already in place, more will continue to be added in Concur. Updates on Concur WalkMe will be communicated through the Weekly Digest.

Stay tuned for more details!

Financial Accounting Program: Upcoming Information Sessions

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)!

We invite you to hear more by attending an upcoming Information Session for the following dates. Please register using links below:

- [Tuesday, February 27, 2024 @ 10:00am - 11:00am](#)
- [Thursday, February 29, 2024 @ 1:00pm - 2:00pm](#)

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.

New Mileage Rates for 2024

Effective January 1st, 2024, University of California has updated its [mileage reimbursement rates](#) in accordance with IRS standard mileage rates. For University business travel, the reimbursement rate for using a private automobile has increased from 65.5 cents per mile to 67 cents per mile. Additionally, the reimbursement rate for driving in connection with a move or relocation has decreased from 22 cents per mile to 21 cents.

The new mileage rates are now reflected in Concur. If you have expenses prior to 2024, please utilize the Miscellaneous expense type and calculate the rate based on the previous mileage rates when submitting your [travel expense report](#).

Update to Requisition Document History

The Reference Document column on the Document History page for requisitions has been hidden due to its lack of useful information and tendency to cause confusion.

This change is tied to the fact that some statuses in Oracle are misleading. For more information about requisition statuses and their meanings, see the Blink page below:

<https://blink.ucsd.edu/buy-pay/ways/oracle-procurement/buyer-wf-enhance.html#Requisition-Statuses>



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

UC San Diego Travel: Before You Go

Thursday, January 25 @ 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, January 25 @ 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 to 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
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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

Come get your questions answered and solidify your understanding during this information-packed session. Don't miss it!

Internal Control & Accounting (ICA) Office Hours

Wednesday, January 31, 2024 @1:00pm - 2:00pm (last Wednesday of the month)

Join us and ask questions related to Payroll reconciliation, Intercampus Recharges, ITFs, General Ledger, Fixed Assets and more in an open forum discussion.

Concur: Event Expenses & Other Reimbursements

Thursday, February 15, 2024 @ 9:00am - 10:30am

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
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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).

ICA 1:1 Sessions

[Sign up](#) for 1:1 zoom session with ICA team members

- **Payroll Financial Management team** 1:1 sessions have moved from UCPATH to ICA.
[Register here](#) for help with Salary Cost Transfers, Direct Retros, Payroll Reconciliations, UCPATH Funding Transactions, Composite Benefit Rates (CBR), General Liability (GAEL) & Vacation Leave Assessment (VLA).
 - **General Ledger Financial Management team**
[Register here](#) for help with General Ledger, Capital/ Fixed Assets, Detail Code setup, ITFs, Internal Controls, Oracle Role questions and more.
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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!



Reminder! 2024-25 Budget Kick-Off Information Session

We invite you to attend an upcoming budget information session.

DATE: January 23, 2024

TIME: 11am-12pm

WHERE: Zoom; <https://ucsd.zoom.us/j/96627862916>.

This session is optional and open to all. During the session our team will provide an overview of the budget climate and timeline, as well as share valuable resource information for upcoming training and system access information. This is a great opportunity to meet some of our CBO team, ask questions, and gain a better understanding of the University's planning process. We look forward to seeing you there!

Reminder! Training Begins January 29th! Oracle Budget (EPBCS) ZOOM and In Person Registration Links Now Available

In Person options are now available for some sessions. Please make sure you select Zoom OR the classroom option. In person sessions are a good opportunity for those who are new to the EPBCS system or the University to get to know our team and a more hands on experience. Register for Zoom or Classroom sessions using the links below:

- Oracle Budget: Budgeting Salaries and Benefits for Academic Units - [Register Here](#)
- Oracle Budget: Budgeting Salaries and Benefits for Admin Units - [Register Here](#)
- Oracle Budget: Non-Compensation Expense Planning - [Register Here](#)
- Oracle Budget: Budgeting Salaries & Benefits in Smart View - [Register Here](#)
- Oracle Budget: Budgeting Non-Compensation in Smart View - [Register Here](#)
- Oracle Budget Data: Smart View Ad Hoc Tips and Tricks - [Register Here](#)

- **Oracle Budget: Budgeting Capital Projects - [Register Here](#)**

These training sessions are designed to help you navigate the Oracle Planning and Budgeting system (EPBCS) and improve your understanding of the budgeting process. We encourage all staff members who are involved in the budgeting within EPBCS for their areas to take advantage of these training opportunities. Training for repeat users is not required but optional.

If you have questions regarding which training sessions to attend, please attend the budget information session on 1/23/24 or submit a ticket to us under the **Services and Support Budget & Finance Ticket portal**:

<https://support.ucsd.edu/finance>. Please select: **Oracle Planning & Budgeting (EPBCS) -> Oracle Planning & Budgeting (EPBCS) Training Inquiries**

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 Guide](#)
- [Resource & Role Analysis](#)
- [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 request 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
- 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 Surveys](#)
- [Business Analysis Hub Help Page](#)

View the full Support Framework on Blink. UC San Diego BUSINESS AND FINANCIAL SERVICES



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

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](#).

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UC San Diego

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