Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial information system and support departments’ success in managing their fiscal responsibilities.

- **March 9th, 2021 - 10th Edition**
- **Budget & Finance Weekly Digest**

Information was curated specifically to support financial review and corrective actions by the University of California San Diego, 9500 Gilman Drive, La Jolla, CA, 92093.

**Tips & Tricks**

- After clicking into the form field, the auto-fill will clear after you start typing in the information in Concur. The Autofill feature will display values to facilitate data entry.
- Google Chrome’s Autofill feature might interfere with entering your chart string if you are added to the Google Autofill list.
- Note that Concur does not provide a way to edit or update chart strings in the expense record. This is to help ensure that expenses are reported within the correct budgetary structure.
- Tax Exempt Code

Reminder: Taxability of the expense is based on the account code tied to the required field to help with proper Use Tax assessment.

**Types and taxability, the process.**

Expense Types, Sales Tax vs. Use Tax, and the Oracle Use Tax Correction Review the Concur Travel & Expense running an invoice hold report in Oracle.

**Tips & Tricks**

- Resolve them. The KBA also references steps for looking up invoice status and resolve the issue. The KBA also references steps for looking up invoice status and resolve the issue.

**Concur Travel & Expense**

9:00am - 11:00am. The course is recurring on a monthly basis. Sign up today in the UC Learning Center.

**Oracle BI & Financial Reporting**

Visit the Concur Travel & Expense 9:00am - 11:00am. The course is recurring on a monthly basis. Sign up today in the UC Learning Center.

**Oracle Financials Cloud**

- All sponsor award management on campus and would like to learn about more information in Concur. The live training course will include an in-depth explanation of Concur and the Oracle Use Tax Correction

**Terms and Conditions**

- Intended for preparers, hosts/payees, and financial managers processes related to meetings, entertainment, and business expense

**Financing & Budgeting**

- The Project Balances with Expenditure Details report has been enhanced, so the Travel team has completed a full redesign of the Travel Blink site. The new layout makes it easier to find the resources you need for all things Travel-related including:

**Pro Tip**

- The Oracle outage on 02/12/21 or 2) a known bug with Oracle. We have identified an issue where various Concur invoices (with the oldest dated 2/17) did not properly load in Oracle and are working on getting invoices

**Concur Travel & Expense**

- The February GL closed on Monday, March 8.

**Pro Tip**

- Revised Cardholder Agreement available for immediate use based on agreements, we recommend deleting them from your drives.

**Training & Events Calendar**

- Join us for the first webinar in a series of fund management training to learn about sponsorship budgeting, proposal-to-award agreement forms, and the pros and cons associated with PPM budget-based vs. GL chart string-based structures.

**General**

- Reminded this is important when reconciling costs looking at the expenditures sponsors shows the "original accounting period" to ensure a match with how the accounting period. The DSH-Project Cost report that OPAFS uses to billable/non-billable, recalculate rate schedules, etc.), the system will "update" B&H Photo orders, and enjoy the functionality of the new B&H Photo Punchout.

**Oracle Procurement Card Blink page**

- IPPS has been working diligently to add new content into Oracle Procurement, and the February GL closed on Monday, March 8.

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