

Budget & Finance Weekly Digest

August 1, 2023 | 132nd Edition

Announcements



Foundation Endowed Chair Recurring Transfers

If you have a Foundation endowed chair (fund number starts A-L) that was set up for recurring transfer from the Foundation to the UCSD ledger, please submit a new transfer request with appropriate approvals. The recurring transfer between ledgers for endowed chairs expires each June 30th so we can comply with PPM 230-8. The form and instructions can be found [here](#).

Recurring transfer requests for other endowments or current use gift funds will continue to process to the chart string originally provided until a ticket is submitted requesting us to stop the recurring transfer. If you'd like to make a change to where the recurring transfer is posting, please submit a new recurring transfer form and we will be happy to update our records.

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, August 15, 2023 @ 10:00am - 11:00am](#)
- [Thursday, August 17, 2023 @ 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.

Oracle Fixed Assets Module Office Hours Monday August 7th

Next **Monday August 7, 2023**, will be the next session of Office Hours. Please join us at **10:05 AM** on [Zoom](#) to learn more about the following topics:

- Cost Transfers for Assets
- Expenditure Type Corrections for Assets



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

[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 knowledge and understanding from a useful and information packed session. Don't miss it!

We will not be holding Fund Management office hours on **Aug. 17th** for the annual Staff Summer celebration.

[Concur: Event Expenses & Other Reimbursements](#)

Thursday, August 17 @ 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, August 24 @ 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, August 24 @ 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 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
-

IPPS Hot Topics: Move/Relocation Policy & Procedures

Wednesday, August 30 @ 10:00am

This Hot Topics Training is great for department Move Coordinators who are in charge of assisting new employees with their Move/Relocation expenses. You will learn about the different move policies, how to find out which policy applies to your employee, reimbursable expenses versus non-reimbursable, the process in Concur to reimburse the employee/reconcile card charges, the taxability component associated with these expenses.

Contract and Invoice Creation Training

Wednesday, August 30 @ 10:00am - 11:00am

Find out about the PPM contract and invoice process. These resources and training are for individuals new to UC San Diego or those interested in refreshing their knowledge of the PPM contract and invoice process.

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).



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

We Are Hiring!

Do you know someone who loves keeping everything organized and is super detail-oriented? We are in search of a [Project Coordinator](#) to manage all of our report development projects, write Blink content, and provide first-line ticket support. They'll get the inside scoop on what's happening with financial reporting and will gain a broad knowledge base on using Oracle and reading financial data. This would be a great position for someone who wants to get into fund management, but doesn't yet have the right experience.



Tips & Tricks

Sharing lodging with colleagues while on university travel status to reduce costs?

We understand travelers may choose to share lodging to offset costs. This aligns with policy. Keep in mind that group travel must have an assigned group leader. Otherwise, travelers will need to cover and reconcile their individual business travel expenses such as transportation, meals etc. under their own Concur profile.

When possible, you can request that the hotel split the charges into separate bills. In a case where travelers share a room, the person who paid in full should be the only one requesting reimbursement. Note that the receipt(s) must show the separate charges. To satisfy the requirements for lodging reimbursement, receipt(s) must state the following: the name of the traveler, the dates of stay, the nightly rate, a breakdown of taxes/fees/incidental expenses, and a form of payment. Reimbursements for personal transactions between travelers such as Venmo, Zelle, etc. cannot go through Concur and must take place between individuals outside of the system. This information is also included in this [Blink site](#).

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) is

Self-Service Resources:

- Your Immediate Supervisor
- [Budget & Finance User Group](#)
- [Accounting Best Practices](#)
- [Accounting Self-Service](#)
- [Published Information on Blackboard](#)
- [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. "need you to process approval..."

Resources:

- [Attend an Office Hours session](#)
- [Contact the Finance Help Line](#)
- [Submit a request ticket to 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](#)
- Submit a ticket to [Budget & Finance Support](#)
- Find the form in our [Support 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 Supporter Box](#)
- [Business Analytics Hub Help Page](#)

View the full Support Framework on Blackboard

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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](#).

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