Budget & Finance Weekly Digest



August 31, 2021 | 35th Edition

Announcements



Oracle Scheduled Maintenance Tonight
The Oracle production environment will be down for maintenance on **Tuesday, 08/31/2021** from **8:00 PM** through **10:00 PM.**

UC San Diego Financial Accounting Program Information Session
We invite you to attend our UC San Diego Financial Accounting Program Information Session this **Thursday, September 2, from 2:00pm - 2:30pm**. This information session consists of a 10-15 minute overview of the UC San Diego Financial Accounting Program (developed in partnership with Business & Financial Services and Extension), the application process, and eligibility, followed by Questions & Answers.

The UC San Diego Financial Accounting Program is a comprehensive financial accounting program that offers training at a basic to intermediate level. This program intends to establish consistent foundational knowledge across the UC San Diego staff members in finance and accounting roles.

The application period for Fall 2021 is September 6 - 17. This program is fully funded by the Chief Financial Officer and offered to the Individual at no cost for the following year. If you are unable to attend the information session, the recording will be posted on Blink.

Save Your Seat

NGN Recharge Rate Increase for Communication Users
A flat monthly charge is levied automatically for each campus employee who qualifies as a **Communication User**, as determined by the employee's payroll title code. A campus-wide committee evaluated every job title and determined whether the majority of its constituents did or did not qualify. Employing the "Communication User" category as a basis for charging is not meant to be a precise reflection of individual use, but rather a fair mechanism for aggregating and averaging communications charges over departments.

Rates for the next 5 year agreement are currently pending. In the meantime, please plan for a 3% general increase - see NGN Communication Access Billing for more information.

Communication User Groups	16/17	17/18	18/19	19/20	20/21	21/22
On-Campus	$92	$94.30	$94.30	$96.37	$98.49	$101.44
Off-Campus	$46	$47.15	$47.15	$48.19	$49.25	$50.73
Med Center	$33	$33.83	$33.83	$34.57	$35.33	$36.39
Graduate Students	$28	$28.70	$28.70	$28.91	$29.55	$30.44
Public Computer Labs	$24	$24.60	$25.00	$25.14	$25.69	$26.46

Summer Salary Composite Benefit Rate Incorrectly Charged
Unfortunately, the fix for this issue that was to be effective July 1, 2021 is not working as expected. UCPath Center is currently investigating this issue. As of FY2021, credits will be provided centrally in Oracle only; the target is now the August accounting period.



Install the WalkMe Browser Extension!
The WalkMe Browser Extension adds various tips, walkthroughs, and resources to your Oracle and Concur applications. We also use WalkMe to add additional validation to your transactions, announcements, and reminders. Download the extension to your browser to unlock these features.



Fund Management Office Hours
Thursdays @ 11:00am - 12:00pm
This Thursday, **September 2**, Eva Thiveos will give a short presentation about

entering PPM Budgets, and the rest of the time will be open for you to bring issues you have been struggling with and get help from your peers.



In next week's Fund Management Office Hours on **September 9**, we will focus on the question of how to find your “available to spend” balances on gift funds and other general projects, which reports you can use to find that information, and why different reports might show different amounts.

We encourage you to watch recorded Fund Management Office Hours.

Oracle: Buying and Paying for PO Requisitioners

Thursday, September 2, 2021 @ 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.

UC San Diego Travel: Before You Go

Thursday, September 9, 2021 @ 9:00am - 11:00am

Faculty and staff who travel or book business travel can further their understanding of preauthorization, booking travel via Concur, prepaying with the Travel & Entertainment Card, and how to take advantage of TripIt Pro. It is recommended that you also attend the UC San Diego Travel: Reporting Expenses course before your trip takes place.

UC San Diego Travel: Reporting Expenses

Thursday, September 9, 2021 @ 1:00pm - 3:00pm

This course provides an overview of UC San Diego travel policy and the reconciliation procedure, including summarized guidelines, resources, and information about online tools. Faculty and staff will learn about Concur processes for reporting travel expenses and how to submit a Travel Expense Report.

University Procurement Card Program

Tuesday, September 14, 2021 @ 1:30pm - 4:00pm

Current and prospective cardholders will learn about updates to the card program, common uses, and the Concur processes for both Procurement Card request and transaction reconciliation.

Note that this is not an introductory course. Participants must first complete the associated eCourse available through the UC Learning Center.

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!



Additional Sponsored Projects Reports

Sponsored Projects AR Aging and Award Trial Balance Report are now available on bah.ucsd.edu. These are reports that OPAFS commonly uses to manage sponsored projects and are useful for departments to see award health.

Campus User Roles Report Enhancements

The Campus User Roles report has become a key tool across campus users. A new enhanced version was promoted to Production. Users can now search by **Full Name**, full or partial email address, and delegated purchase authority. The prompts have been reordered for ease of use.

Sunset Alert

The Oracle BI team has been working hard to remove duplicates and streamline reporting. The following reports have been sunset due to duplication and/or the release of new and enhanced versions:



Please remember to access your reports using bah.ucsd.edu to eliminate expired or invalid bookmarks. Thank you for your cooperation.



Requisition Status in Oracle Procurement
Check the status of your requisition by clicking the *Pending Approval* link on the requisition page. The current step is the last step in blue which does not have a checkmark next to it. If the step is preceded by a number, then it is pending the approval of your financial unit. Refer to our How to Check Requisition Status in Oracle Procurement KBA for more information and tips.

Reassign Requisitions in Oracle Procurement
You can reassign a requisition to allow someone else to complete and submit the requisition, process change orders, or cancel the PO. Refer to our How to Assign a Shopping Cart or Requisition in Oracle Procurement KBA for instructions on how to do so.

Resolving COA/POETAF Failed Validation Errors in Concur
After a Request or Expense Report is submitted, chart string information is validated against data in Oracle before entering the approval workflow. Should you encounter errors related to the COA/POETAF information entered in your Concur document, refer to our How to Resolve COA/POETAF Failed Validation

Errors KBA for guidance. The Knowledge Base Article provides a list of common validation errors with a description for each error type, as well as instructions on resolution steps.

Available Expenses for Travel in Concur

Concur displays anything booked in Concur or with Balboa Travel as an *Available Expense*. You might see reservations along with purchases made with our CTS Air & Hotel card or your own Travel & Entertainment Card (T&E card). Purchases on a UC card product like the T&E Card will be clearly identified in the *Payment Type* column. Reservations, including anything sent to your TripIt account or personal bookings, may show up as a *Payment to Employee* and can be deleted if needed.

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.

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