

# Budget & Finance Weekly Digest

May 7th, 2024 | 170th Edition

## Announcements

### **NEW!** Updates to Project & Award Data Update Application (PADUA)

- Projects now have nickname functionality:
  - When editing a project in PADUA users can now add a nickname for easier referencing.
  - Nickname will be visible on the Faculty and Researcher Dashboard in August 2024.
- Sponsored Project tasks can now be updated to chargeable or not. Any changes to this field will prompt an approval workflow.
- Various contract line updates to improve SPF internal processes with regards to new project and task setups.

### **NEW!** Oracle Export Functionality

If over 1,500 transactions, a job called "Export Data to Excel" is initiated, generating a job ID pop-up. Once completed, a notification appears in your notifications (as indicated by the "bell" icon). Access the exported Excel file from there or from the Oracle Home Page under "Things to Finish." Depending on row count, download time varies. Alternatively, use the Process Monitor on the Overview page of Costs, search for "Export Data to Excel," and download the file from the Log and Output attachment.

Do you have ideas for Financial Process Improvements? Tell us! The Process and Systems Optimization team would love to hear your ideas on how financial processes could be improved. Submit a ticket to describe the current process, its pain points, and how you think it could be improved. All ideas are reviewed and vetted for feasibility. Use [this form](#) and select *Idea to streamline a financial business process*.

### **CIPERB Launch & Sign Up: CIPERB officially launched on May 6th!**

CIPERB (Customers, Invoices, Project Expenses Report & Billing) is a new tool that provides full functionality for individuals to manage customers under the Accounts Receivable module in the OFC application. Customer data created and updated via CIPERB will be updated in real-time in Oracle to improve customer experiences and increase operational efficiency. This initial release will focus on Customer Accounts only; the following versions will expand upon further applications.

Register for one of the following training sessions (please use your UC campus email for registration):

#### [CIPERB Training 2](#)

Wednesday, 05/08/24 @ 10:00 AM - 11:00 AM

### [CIPERB Training 3](#)

Wednesday, 05/15/24 @ 10:00 AM - 11:00 AM

### [CIPERB Training 4](#)

Wednesday, 05/22/24 @ 10:00 AM - 11:00 AM

### [CIPERB Training 5](#)

Wednesday, 06/05/24 @ 10:00 AM - 11:00 AM

### [CIPERB Training 6](#)

Thursday, 06/20/24 @ 10:00 AM - 11:00 AM

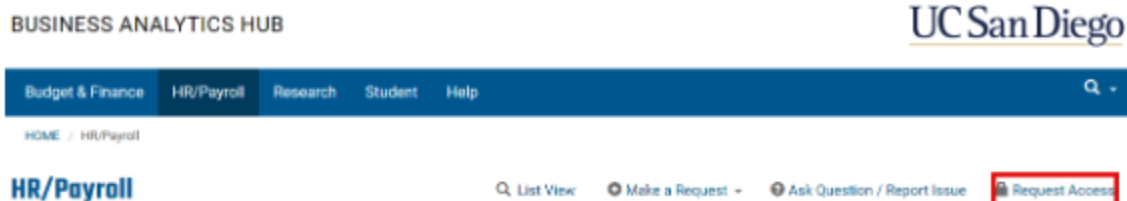
## Tips & Tricks

### Cognos and Oracle Tips & Tricks

To get access to reports available on the Business Analytics Hub ([bah.ucsd.edu](http://bah.ucsd.edu)), go to the page that houses the report and click on the "Request Access" button, which is located in the upper right corner. You'll be redirected to a form that you can fill in for yourself or on behalf of someone else.

Depending on the group that owns the report, you'll need to request access from a different page on BAH (Budget & Finance, HR/Payroll, etc.). For example, if you need access to the DOPE report, you'll click on the "Request Access" button from the HR/Payroll page on BAH.

You can find more Cognos and Oracle tips & tricks [here](#).



## Training & Support



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

### [ECERT Effort Reporting Office Hours](#)

Every Wednesday @ 2:30 PM - 3:30 PM

Come get your questions answered, system access setups, or helpful hints on the effort report certification process.

### [Fund Management Office Hours](#)

Every Thursday @ 11:00 AM - 12:00 PM

### **Concur: Event Expenses & Other Reimbursements**

**Thursday, May 16 @ 9:00 AM - 10:30 AM**

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 to request 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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### **Financial Operations Office Hours**

**Friday, May 17 @ 9:00 AM - 10:00 AM**

Join the Financial Operations team on Friday the 17th for updates from Accounts Receivable, Strategic Design, Cash & Merchant Services and Equipment Management, Open Q&A. As always we will have open forum discussions, any updates we might have to share with you, and general Q&A sessions. We look forward to seeing you there!

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### **UC San Diego Travel: Before You Go**

**Thursday, May 23 @ 9:00 AM - 11:00 AM**

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 pre-authorization via Concur Request
  - Be able to request a new University Travel & Entertainment Card
  - Learn how to book travel via Concur Travel
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### **UC San Diego Travel: Reporting Expenses**

**Thursday, May 23 @ 1:00 PM - 3:00 PM**

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's 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 per 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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### IPPS Office Hours

IPPS holds **weekly [Office Hours](#)** to help with all of your questions related to Procurement, Accounts Payable, Travel and Entertainment, Procurement Card, and Tax & Account/Supplier Setup. This is our schedule:

- **[Procure-to-Pay, Travel & Entertainment, Tax & Accounting/Supplier Setup](#)**
    - Mondays, 1:00 PM - 2:00 PM
    - Wednesdays and Fridays, 9:00 AM - 10:00 AM
  - **[Procurement Card](#)**
    - Wednesdays, 9:00 AM - 10:00 AM
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### 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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### 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).

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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!*

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### 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.

<p><b>TIER 0</b></p> <p><b>What Can I Do On My Own?</b></p> <p>Applies to you if you:</p> <ul style="list-style-type: none"> <li>• Want to find published support information anytime</li> <li>• Don't want to wait in line for your question to be answered</li> <li>• Don't know who your department Subject Matter Experts (SME's) are</li> </ul>	<p><b>Self-Service Resources:</b></p> <ul style="list-style-type: none"> <li>• Your Immediate Supervisor</li> <li>• <a href="#">Budget &amp; Finance Help Line</a></li> <li>• <a href="#">Resource &amp; Best Practices</a></li> <li>• <a href="#">Community of Practice</a></li> <li>• <a href="#">Published Information on Blink</a></li> <li>• <a href="#">Transaction Videos</a></li> </ul>
<p><b>TIER 1</b></p> <p><b>Where Can I Get Help?</b></p> <p>Applies to you if you:</p> <ul style="list-style-type: none"> <li>• Have a question that is unable to be answered by your department SME or self-service resources</li> <li>• Have a question that can be quickly answered by a knowledgeable representative</li> <li>• Need to process a transaction in Services &amp; Support             <ul style="list-style-type: none"> <li>• E.g. "I need you to process/approve/route..."</li> </ul> </li> </ul>	<p><b>Resources:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Attend an Office Hours session</a></li> <li>• <a href="#">Contact the Finance Help Line</a></li> <li>• <a href="#">Submit a request ticket to Services &amp; Support</a></li> </ul>
<p><b>TIER 2</b></p> <p><b>Who Can Help Escalate?</b></p> <p>Applies to you if you:</p> <ul style="list-style-type: none"> <li>• Are unsure how to submit your request/ticket</li> <li>• Have submitted a ticket and are not receiving a response             <ul style="list-style-type: none"> <li>• Please try to give agents enough time to process your requests before escalating the ticket</li> </ul> </li> <li>• Identify something that does not seem to be working properly</li> </ul>	<p><b>Resources:</b></p> <ul style="list-style-type: none"> <li>• Contact the central support team directly at <a href="#">finance.support@ucsd.edu</a></li> <li>• Submit a ticket to <a href="#">Budget &amp; Finance Support</a></li> <li>• Find the form in our <a href="#">Request Catalog</a> to process your transaction request</li> </ul>
<p><b>TIER 3</b></p> <p><b>How Do I Suggest Enhancements?</b></p> <p>Applies to you if you would like to suggest:</p> <ul style="list-style-type: none"> <li>• An enhancement to a financial system</li> <li>• Idea to streamline a financial business process</li> <li>• Oracle &amp; Concur financial reporting enhancement</li> </ul>	<p><b>Resources:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Budget &amp; Finance Suggestion Box</a></li> <li>• <a href="#">Business Analysts Help Page</a></li> </ul>

[View the full Support Framework on Blink.](#)

UC San Diego  
BUDGET AND FINANCE SUPPORT



## 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**

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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