responsibilities, identify their resources based on the following questions:

The Learning all there is to know about budget & finance can feel daunting.

In this course, you will learn about Concur processes for prepaying travel and claiming expenses after the business trip and information about online tools.

The course provides an overview of UC San Diego travel policy and procedure, including summarized guidelines, resources, preparers (Concur Delegates) and approvers.

Intended for: Those involved in the process of trip reconciliation for business travel at UC San Diego, including travelers, financial managers who are familiar with Travel Policy G-28 and would like to learn about more advanced preauthorization and UC San Diego's instance of Concur Travel booking tool. Intended for travel arrangers, delegates, be especially valuable for employees who travel or book business travel and want to further their understanding of travel

The course will include an in-depth explanation of topics covered in the Concur Travel and Expense eCourse. This course will

Thursday, January 26 @ 9:00am - 11:00am

UC San Diego Travel: Reporting Expenses

This course will be especially valuable for employees who want to further their understanding of buying on campus or those

Oracle: Buying and Paying for Goods & Services

IPPS Hot Topics: Oracle Procurement Enhancements

Management Dashboard

Through your use cases, and hear how others are using the dashboard or report. Next week's session will feature the

an interactive report demo, discussion of what questions the report can answer, opportunities to ask questions and walk

forward to seeing you there!

Join the Financial Operations team this Friday for updates on Multiple Services Billing, PPM Updates-cost transfer Dual

Cost Transfer Dual Roles

As part of a new enhancement to Cost Transfer workflow, you will no longer see workflow steps showing as automatically

KB0033457 - How to Initiate a Full or Partial Cost Transfer in Oracle PPM

FAQ: BUS-49 Cash Handling Policy

Who will be impacted?

Project Cost Adjusters and Approvers

After a number of budget adjustments have been requested, and once the adjustments have been approved, the next step is to apply these adjustments to the budget. The person who initiates the cost transfer is responsible for the accuracy of this process.

To request additional roles, submit a Services & Support role request form

Cost Transfer Workflow

If you are responsible for the budget, you may request to become a Project Cost Adjuster and Approvers. This role allows you to make changes to the budget, and also to see other people's changes. The cost transfer initiator must have the Power Center role to approve their own adjustments. However, if they are the primary approver, they must request an additional role to be a secondary or backup approver. The cost transfer workflow will be described at the training.

To request assistance with these roles, please see the Information Technology team.

To request additional roles, submit a Services & Support role request form

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FAQ: BUS-49 Cash Handling Policy

Who can

Where can I

What can I do

Tips & Tracks

Support Framework

Be able to view and reconcile Travel & Entertainment card transactions

Be able to request a new University Travel & Entertainment Car

Claiming traveler reimbursement

Making deposits, such as for hotels

Processing NonPO payments through Oracle Procurement

Approving invoices and requisitions

Searching across UC San Diego requisitions and POs

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January 17, 2023

The new acknowledgement requirement on the Cashiers Deposit Form.

New Service from Balboa Travel

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An acknowledgement checkbox has been added to the

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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.