Learning all there is to know about budget & finance can feel daunting. The Support Framework: Your Guide to Finding Help

Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer questions about financial reporting and dashboards/panoramas in the Business Analytics Hub (BAH).

Topics Covered:

In this course, you will learn about Concur processes for prepaying travel and claiming expenses after the business trip. The course provides an overview of UC San Diego travel policy and procedure, including summarized guidelines, resources, advanced buying terminology and concepts. 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.

UC San Diego Travel: Before You Go

Topics Covered:

The course provides an overview of UC San Diego travel policy and procedure, including summarized guidelines, resources, advanced buying terminology and concepts. 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 sponsored award management on campus and would like to learn about more advanced meetings and entertainment terminology and concepts.

Concur: Event Expenses & Other 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 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.

Project Cost Adjusters and Approvers

Note: Small departments with fewer users will need to identify a backup approver. For example, if the primary approver is also the primary preparer, the department should request the primary preparer as a backup approver. Users with both roles will not be able to approve their own initiated cost transfers. The recommendation is to only request both roles if needed. Example scenarios include small departments where employees need to function in both roles, or an employee who has moved departments, but is still supporting the previous department as an initiator or an approver.

See also the Concur: Event Expenses & Other Reimbursements course for information on how to request event reimbursements.

Resources

Anyone using the Cashier Deposit Form in Services & Support to improve compliance.

An acknowledgement checkbox has been added to the Cashiers Deposit Form Update.

Anyone using the Cashier Deposit Form in Services & Support to improve compliance.

Who will be impacted?

Anyone using the Cashier Deposit Form in Services & Support to improve compliance.

An acknowledgement checkbox has been added to the Cashiers Deposit Form Update.

Who can help escalate?

Anyone using the Cashier Deposit Form in Services & Support to improve compliance.

An acknowledgement checkbox has been added to the Cashiers Deposit Form Update.

Where can I get help?

Anyone using the Cashier Deposit Form in Services & Support to improve compliance.

An acknowledgement checkbox has been added to the Cashiers Deposit Form Update.

Tips & Tricks

Support Framework

General Information:

- Be sure to try out the different calendar views in the upper right corner!

- Check out the Event Calendar, which showcases a consolidated view of Office Hours, Instructor-Led Training sessions, and Hot Topics.

- Use Blink, which showcases a consolidated view of Office Hours, Instructor-Led Training sessions, and Hot Topics.

- Enroll in a training session through the Instructor-Led Training Calendar.

- Attend the next in-person session through the Instructor-Led Training Calendar.

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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.