Budget & Finance Weekly Digest



April 19, 2022 *67th Edition*

Announcements



Upcoming Report Release: Expanded Project Summary Report
The new Expanded Project Summary Report will be available starting **Tuesday, April 26** in the Business Analytics Hub. This report will offer the drill through pages of the Faculty and Researcher Dashboard, but will be standalone and searchable by award, project, and project-task. There will be a single report with PPM details on one tab and GL details on another tab. It will also include payroll projection details. Stay tuned for more information!

In Case You Missed It!
Introducing Financial Operations: Relaunch of Office Hours
Previously, our office hours only covered Accounts Receivable-related topics. We are happy to announce that our monthly Financial Operations Office Hours will now cover **all** Financial Operations topics:

- Accounts Receivable
- Cash & Merchant Services
- Equipment Asset Management
- PPM Strategic Design

On April 15, 2022, we reintroduced the Financial Operations team. Watch the introduction on our YouTube here!

Please feel free to suggest future office hour topics here. We look forward to hearing from you!



Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel.

Fund Management Office Hours
Every Thursday @ 11:00am - 12:00pm
This week we will have open Q&A. Bring your questions and struggles. Nothing a fund manager does is off the table. Trying to figure out the source of a GL-PPM discrepancy? Can't figure out how to get your direct

retro with cap gap to work? See a wire you need to claim but have no idea what to do next? Bring your issue to office hours and phone a friend.

Oracle: Buying and Paying for PO Requisitioners

Thursday, April 21, 2022 @ 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.

Fiscal Year Close Preparations

Thursday, April 28, 2022 @ 8:30am - 9:30am

Learn how best to prepare your transactions to meet the fiscal year deadlines for the Procure-to-Pay and Travel & Expense spaces in our next Hot Topics session.

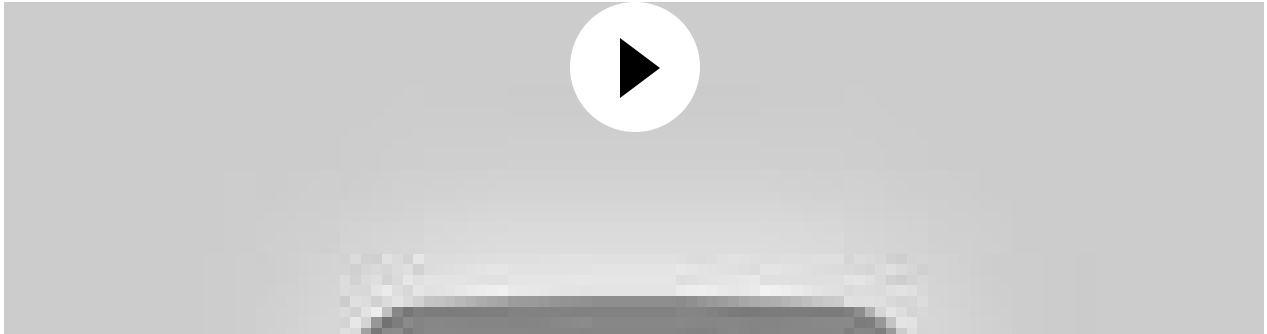
Concur: Event and Expense Reimbursements

Thursday, April 28, 2022 @ 9:00am - 11:00am

This live course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. Intended for preparers, hosts/payees, and financial managers who are familiar with policy and would like to learn about the expense reconciliation process in Concur.

Call the UC San Diego Finance Help Line!

We'll answer your questions or find a solution together.



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!



Arranging Moving Company Service
Department move coordinators: Pay the UC contracted moving company for the new employee's move with your Travel & Entertainment (T&E) Card, and reconcile the transaction in Concur. To avoid declines, the department move coordinator/cardholder must have the moving company vendor Merchant Category Code (MCC) added to their card.

You can request to add the MCC by submitting a Services & Support ticket to Travel & Expense if that is the only request. If you also require a limit increase, you can notate it in the Comments text field of a T&E Card Action Request in Concur.

Review Blink for guidance on how to arrange a moving company service for household moves with a direct link to the KBA.

Reconcile Expenses and Card Transactions
UC San Diego travelers, hosts, and cardholders must adequately account to the University for expenses within a reasonable period of time. Add expenses and move any pending card transactions from Available Expenses onto the proper Expense Report(s) and, as applicable, submit them for approval before the respective fiscal close cutoff dates.
Reminder:

- **Travel & Entertainment**: Report card transactions and related expenses on a Travel/Event Expense Report *within 45 days* after the trip or event has occurred
- **Procurement Card:** Reconcile card transactions on an Procurement Expense Report on a *monthly* basis

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 **find answers**?
- Where do I go to **submit a request**?
- Where do I go to **submit an enhancement or idea**?

Bookmark or download a copy for quick links to various resources available to you.

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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