Where do I go to learn about the Procure-to-Pay process? This live course will include an in-depth explanation of Concur processes related to meetings, travel, and expense reimbursement. It is intended for preparers, hosts/payees, and financial managers who are familiar with policy and would like to learn about the expense reimbursement process. The course will be especially valuable for individuals responsible for departmental procurement. The weekly digest will include a link to a webinar on the topic. The webinar will be recorded and available on the UC San Diego Finance YouTube channel.

Wednesday, April 13, 2022
8:30am - 9:30am
Learn the basics of travel and expense reimbursement. We’ll answer your questions or find a solution together. Our goal is to deliver timely information that matters to you.

Thursday, April 14, 2022
8:30am - 9:30am
Understand thecollapsed report view of the Faculty and Staff Monthly Expense Report. Be sure to try out the different calendar views in the upper right corner!

Thursday, April 14, 2022
9:00am - 10:00am
Identify and resolve accounts payable and general ledger discrepancies. This week we will have open Q&A. Bring your questions and struggles. Nothing a fund manager can’t fix.

Every Thursday
8:30am - 9:30am
Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel.

In Case You Missed It!
Thursday, April 7, 2022
6:00pm - 7:00pm
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.

On April 15, 2022, we reintroduced the Financial Operations team. Previously, our office hours only covered Accounts Receivable-related topics. We are happy to support you with all your financial operations-related questions. For new topics, we will also include payroll projection details. Stay tuned for more information!

New Financial Operations: Office Hours

The new Expanded Project Summary Report will be available starting Tuesday, April 26. This report will offer the drill through pages of the Faculty and Staff Monthly Expense Report. This report will offer the drill through pages of the Faculty and Staff Monthly Expense Report. This report will offer the drill through pages of the Faculty and Staff Monthly Expense Report. It will be a single report with PPM details on one tab and GL details on another tab. It will offer a consolidated view across multiple reports, including GL summary and PPM summary reports. This report will be especially useful for individuals responsible for tracking expenses and understanding the financial implications. The report will be available on the UC San Diego Business Analytics Hub and will be searchable by award, project, and project-type. This report will be especially useful for individuals responsible for tracking expenses and understanding the financial implications.

Upcoming Report Release: Expanded Project Summary Report

The Support Framework: Your Guide to Finding Help

Support Framework is designed to help the Budget & Finance community, including faculty and staff with financial responsibilities, identify their resources based on the following questions:

- Equipment Asset Management
- Cash & Merchant Services
- Accounts Receivable
- Oracle: Buying and Paying for PO
- Procurement Expense Report
- Travel & Entertainment

When can I find answers on my own?

Search the support framework for hackers, or ask a friend.

Find answers from the support framework.

Fiscal Year Close Preparations

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.

Thursday, April 28, 2022
8:30am - 9:30am
Fiscal Year Close Preparations: Learn best practices for closure for Procure-to-Pay and Travel & Expense. If you have any questions regarding this topic, please submit them for approval before the respective fiscal close cutoff dates. If you have any questions regarding this topic, please submit them for approval before the respective fiscal close cutoff dates.

Tips & Tricks

Managing a Procurement Company Service Desk

Financial Operations topics:

- Oracle: Purchasing
- Equipment Asset Management
- Cash & Merchant Services
- Accounts Receivable

Instructor-Led Training sessions, and Hot Topics.