

May 16, 2023 | 121st Edition



Financial Accounting Program: Upcoming Information Sessions
The UC San Diego Financial Accounting Program is a complementary professional development opportunity being offered to help you become more effective in your role. This program is currently offered at no cost to eligible career employees through the end of 2023 calendar year! We invite you to hear more by attending an upcoming **Information Session** for the following dates. Please register using links below:

- Tuesday, May 9, 2023 @ 10:00am - 11:00am
- Thursday, May 11, 2023 @ 1:00pm - 2:00pm

You are encouraged to share this information with your teams, colleagues, and those who may be interested in participating in the full program or Financial Accounting for Non-Accountants (FAFNA) as a standalone course.

We appreciate the partnership with UC San Diego Division of Extended Studies and the support from supervisors across campus and health sciences.

Having an On-Campus Event? Here are some simple steps to ensure success!

- All food, beverage, and bartending expenses should be processed through Concur. Please keep in mind that:
  - This includes bartending services without the purchase of alcohol.
  - No food/drink should be processed through Oracle Procurement.
  - Once all approvals are complete, you'll receive a PDF order confirmation that you can send to the vendor.
- Reminder that all full service, on-campus catering must go through UC San Diego Catering, per Regents Policy 5402.
- Need more information? Check out this Blink page.

Concur User Interface (UI) Updates Coming Soon
Starting May 20th, Concur users will have the ability to switch over to Concur's newest User Interface (UI). In October, this will become the default theme and by January 2024, the old theme will no longer be available. To get a sneak preview of what the new theme will look like, check out this video.

New Blink Page: PaymentWorks FAQ
IPPS has launched a PaymentWorks FAQ page to provide support for its employees and affiliated with the PaymentWorks platform. The FAQ addresses topics such as payee registration and the onboarding tracker, as well as other topics that will simplify the payment and vendor management process.

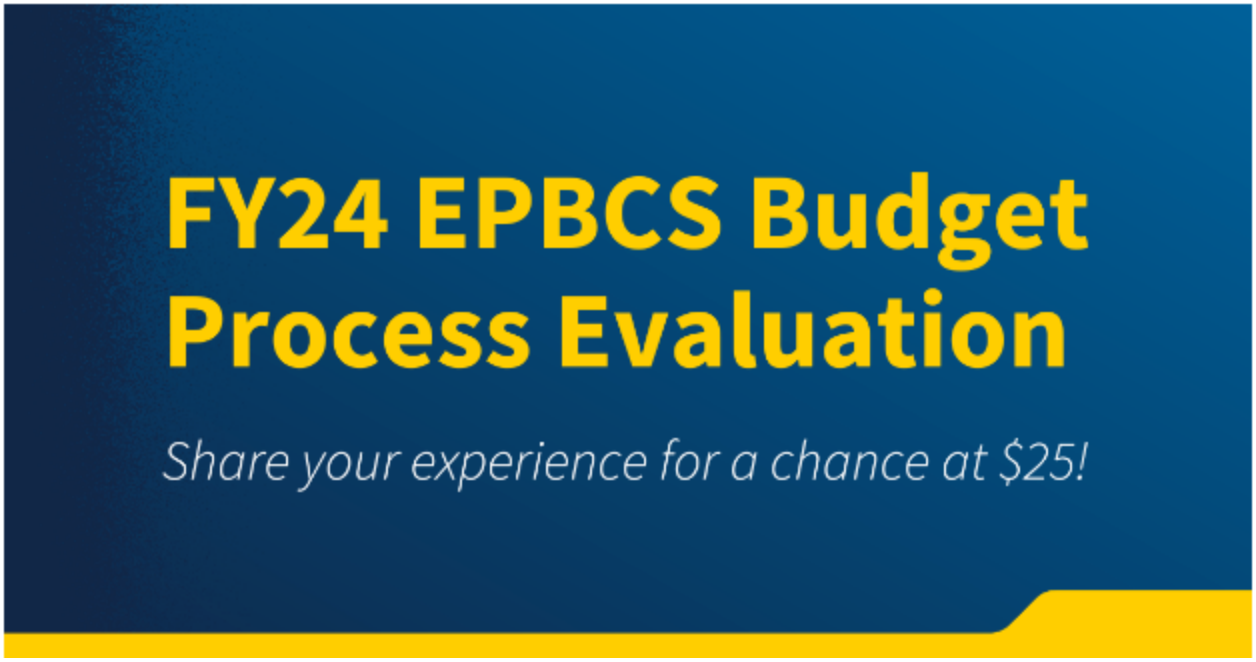
Update on PaymentWorks Registrations
Having received a higher-than-normal amount of new and updated registrations in PaymentWorks, our teams are working hard to process registrations within our targeted 3-5 business day turnaround. We appreciate your patience and discretion in creating a Services & Support inquiry only if the registration needs to be urgently processed.

Accounts Receivable Participation at the 2023 Symposium for University Research Fundamentals (SURF)
The Accounts Receivable team will be participating in this year's SURF event!
Stop by our booth and meet our team participants! Learn important issues, new policies, and emerging trends. Register for the event here: https://blink.ucsd.edu/sponsor/rci/surf-2023-event-page.html.

Welcome to all faculty, researchers, students, staff, scholars, and administrators. CEU credits will be available. Food and refreshments will be provided. The registration information is below:

Date: May 24, 2023
Time: 8:30am - 3:00pm
Location: Price Center West Ballroom AB
Online Pre-Registration

Extended! FY24 EPBCS Budget Process Survey
Did you help to prepare your department's FY24 budget plan in Oracle Planning and Budgeting (EPBCS)? We want to hear from you! Your feedback is critical to CBO's ongoing efforts to improve the campus budget process. Completing this survey should take you less than 10 minutes and will enter you to win one of four $25 VISA cards that we are giving away to thank you for your partnership and participation. The evaluation closes **Friday May 19, 2023**.



Click here to complete the FY24 EPBCS Budget Process Evaluation Survey



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

Effort Report Training and Refresher
Wednesday, May 17 @ 9:00am - 10:00am
Thursday, May 18 @ 1:00pm - 2:00pm
The course will include an in-depth explanation of the Effort Reporting Process and how to complete them in ECERT. This course will be especially valuable for employees who review and/or certify effort reports. Intended for reviewers, preparers, and certifiers.

Topics Covered:

- Effort reporting requirements.
- Effort reporting roles and responsibilities.
- How to use the effort reporting tool (ECERT).
- Support for completing the effort reports.

Fiscal Close Office Hours
Every Wednesday @ 10:00am - 10:30am
From now until August 2nd, join the Fiscal Close Office Hours to ask questions and provide feedback regarding fiscal close activities.

Navigating Hotel Rates

Wednesday, May 17 @ 11:00am

While UC has a global contract with Marriott and other localized hotel agreements, UC's needs are varied from individual travel to conferences and group travel. We will share how to navigate these various options, including understanding government rates and analyzing rate rules and restrictions.

UC San Diego Travel: Before You Go

Thursday, May 18 @ 9:00am - 11:00am

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 preauthorization via Concur Request.
- Be able to request a new University Travel & Entertainment Card.
- Learn how to book travel via Concur Travel.

Fund Management Office Hours

Every Thursday 11:00am - 12:00pm

Come get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

UC San Diego Travel: Reporting Expenses

Thursday, May 18 @ 1:00pm - 3:00pm

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 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 in accordance to 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.

Financial Operations Office Hours

Friday, May 19 @ 9:00am - 10:00am

Join the Financial Operations team this Friday for updates on Fiscal Close, PADUA reminders, PPM Invoice Creation reminders, Common Invoice Generation bottlenecks, Deposit reminders and Open Q&A. We look forward to seeing you there!

Reporting Workshop: Dashboard of the Week Series

Monday, May 22 @ 11:00am

Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include discussions and report demos to help address some of your frequently asked questions. There may also be opportunities to win prizes during the series! Next week's session will feature three reports, the **Project Management Dashboard, Expanded Project Summary, and DOPES report** on How to identify and clear deficits on sponsored projects.

Understanding UC's Car Rental Rates

Wednesday, May 24 @ 11:00am

This session will go over our car rental program, what that means and how to take advantage of it for personal travel. Melissa Burley (UC Risk Services) will join us to share information on insurance coverage for business rentals.

Oracle: Buying and Paying for PO Requisitioners

Thursday, May 25 @ 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.

Contract and Invoice Creation Training Relaunch

Wednesday, May 31 @ 10:00am - 11:00am

Find out about the PPM contract and invoice process. These resources and training are for individuals new to UC San Diego or those interested in refreshing their knowledge of the PPM contract and invoice process.

Mixing Business with Personal Travel

Wednesday, June 7 @ 11:00am

Mixing business with personal can be a sustainable way to travel, so we will share some tips on how to do so without using any UC funds

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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).

Have Finance-related questions?
Call the UC San Diego Finance Help Line.

(858) 246-4237 **Tuesdays - Thursdays | 10:00am - 12:00pm & 1:00pm - 3:00pm**

Call the UC San Diego Finance Help Line! 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!



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.



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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UC San Diego

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