

Budget & Finance Weekly Digest

March 26th, 2024 | 164th Edition

Announcements

Get to Know Concur 2.0 - Webinars & Office Hours

Integrated Procure-to-Pay Solutions (IPPS) is hosting three webinars to help campus clients familiarize themselves with the upcoming Concur 2.0 release. These webinars, scheduled before and after the launch, will provide in-depth presentations on the key enhancements and include live demos and Q&A sessions.

In addition to the webinars, a team of Concur 2.0 subject matter experts will be available during the *Procure-to-Pay & Travel and Expense* Office Hours the week of the launch. The team will host dedicated Concur 2.0 breakout rooms to provide additional support and address any questions or concerns that may arise.

Concur 2.0 Webinar Schedule

Tuesday, April 2nd: 11:00 AM – 12:00 PM

Thursday, April 11th: 10:00 AM – 11:00 AM

Thursday, April 18th: 1:00 PM – 2:00 PM

Zoom links will be posted soon. Continue to refer to the [Concur 2.0 Blink page](#) for updates.

Concur 2.0 Office Hours Schedule

Procure-to-Pay & Travel and Expense

Monday, April 8th: 1:00 PM – 2:00 PM

Wednesday, April 10th: 9:00 AM – 10:00 AM

Friday, April 12th: 9:00 AM – 10:00 AM

To access the Zoom link for *Procure-to-Pay & Travel and Expense* Office Hours, visit [Finance Office Hours Support](#) or [Concur 2.0](#) on Blink.

Celebrating Women's History Month

Throughout March, we're shining a spotlight on the diverse talents and contributions of our female colleagues in celebration of Women's History Month. We invite you to join us by following us on [Instagram](#), sharing your stories via this [link](#), and offering recognition to inspiring women you work with by filling out this [form](#). This is a unique opportunity to reflect on what Women's History Month means to you and to witness the achievements and contributions we're highlighting all month long.

Campus Budget Office Updates

EPBCS Support Office Hours Conclude This Week on March 28th. Join us Thursday 11:00 AM - 12:00 PM via Zoom

Join us for office hours if you have questions about budgeting in EPBCS.

Zoom: <https://ucsd.zoom.us/j/91798780724>

The EPBCS system will close at 5:00 PM on Monday, April 1st, 2024.

Training & Support



Watch recorded office hours and more on our [UC San Diego Budget & Finance YouTube channel](#).

[Internal Control & Accounting \(ICA\) Office Hours](#)

Wednesday, March 27, 2024 @1:00pm - 2:00pm (last Wednesday of the month)

Join us and ask questions related to Payroll reconciliation, Intercampus Recharges, ITFs, General Ledger, Fixed Assets and more in an open forum discussion.

[ECERT Effort Reporting Office Hours](#)

Every Wednesday @ 2:30pm - 3:30pm

Come get your questions answered, system access setups, or helpful hints on the effort report certification process.

[Fund Management Office Hours](#)

Every Thursday @ 11:00am - 12:00pm

Come get your questions answered and solidify your understanding during this information-packed session. Don't miss it!

IPPS Office Hours

IPPS holds **weekly** [Office Hours](#) to help with all of your questions related to Procurement, Accounts Payable, Travel and Entertainment, Procurement Card, and Tax & Account/Supplier Setup. This is our schedule:

- **[Procure-to-Pay, Travel & Entertainment, Tax & Accounting/Supplier Setup](#)**
 - Mondays, 1:00pm - 2:00pm, Wednesdays and Fridays 9:00am - 10:00am
- **[Procurement Card](#)**
 - Wednesdays, 9:00am - 10:00am

ICA 1:1 Sessions

[Sign up](#) for 1:1 zoom session with ICA team members

- ***Payroll Financial Management team*** 1:1 sessions have moved from UCPATH to ICA.
[Register here](#) for help with Salary Cost Transfers, Direct Retros, Payroll Reconciliations, UCPATH Funding Transactions, Composite Benefit Rates (CBR), General Liability (GAEL) & Vacation Leave Assessment (VLA).
- ***General Ledger Financial Management team***
[Register here](#) for help with General Ledger, Capital/ Fixed Assets, Detail Code setup, ITFs, Internal Controls, Oracle Role questions and more.

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).

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.



Support Framework

Not sure where to find answers? Our support framework is designed to help the Budget & Finance community, including faculty or staff with financial responsibilities, identify resources.

TIER 0 **What Can I Do On My Own?**

Applies to you if you:

- Want to find published support information anytime
- Don't want to wait in line for your question to be answered
- Don't know who your department Subject Matter Experts (SME)'s are

Self-Service Resources:

- Your Immediate Supervisor
- [Budget & Finance Help Center](#)
- [Faculty & Staff Articles](#)
- [Community of Practice](#)
- [Published Information in Blink](#)
- [Finance Videos](#)

TIER 1 **Where Can I Get Help?**

Applies to you if you:

- Have a question that is unable to be answered by your department SME or self-service resources
- Have a question that can be quickly answered by a knowledgeable representative
- Need to process a transaction in Services & Support
 - E.g. "I need you to process/approve/route..."

Resources:

- [Attend an Office Hours session](#)
- [Contact the Finance Help Line](#)
- [Submit a support ticket to Services & Support](#)

TIER 2 **Who Can Help Escalate?**

Applies to you if you:

- Are unsure how to submit your request/ticket
- Have submitted a ticket and are not receiving a response
 - Please try to give agents enough time to process your requests before escalating the ticket
- Identify something that does not seem to be working properly

Resources:

- Contact the central support team directly at finance.support@ucsd.edu
- Submit a ticket to [Budget & Finance Services](#)
- Find the form in our [Support Catalog](#) to process your transaction request

TIER 3 **How Do I Suggest Enhancements?**

Applies to you if you would like to suggest:

- An enhancement to a financial system
- Idea to streamline a financial business process
- Oracle & Concur financial reporting enhancement

Resources:

- [Budget & Finance Improvement Box](#)
- [Business Analytics Hub \(BAH\) Data](#)

[View the full Support Framework on Blink.](#)

UC San Diego
UNIVERSITY OF CALIFORNIA, SAN DIEGO



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

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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