

# 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.

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## 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.

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## 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!

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## **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

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## **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.

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](#)
- [Knowledge Base Articles](#)
- [Community of Practice](#)
- [Published Information in Blink](#)
- [Research Guides](#)

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 [financesupport@ucsd.edu](mailto:financesupport@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 Help Desk](#)

[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.

( 8 5 8 ) 2 4 6 - 4 2 3 7      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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