Budget & Finance Weekly Digest

August 30, 2022 | 86th Edition

Announcements

Oracle Workflow Notification Updates are LIVE!
Beginning August 29, 2022, Oracle Workflow Notifications have been updated with more detailed information to allow you to take advantage of the ability to approve your transactions via email. You can review the details of the following notifications that have been updated on Blink:

- Accounts Payable Invoices and Invoice Holds
- Contract Invoices
- Journals
- Requisitions, Purchase Orders, and Change Orders
- Project Budgets (Financial Plans)

Due to limited functionality, the following notifications cannot be updated at this time:

- Contracts
- FYI Requisition Approved
- FYI Purchase Order Implemented
- Project Cost Adjustments

Procurement Card Policy Exception Update
On October 1, 2022, the process for purchasing food for Student Programmatic Activities will fully transition from the Procurement Card to the Travel & Entertainment Card (T&E-Card) - the appropriate corporate card for this type of expense. US Bank will automatically remove food-related MCC exceptions on all Procurement Card accounts by the cutoff date. This

transition will only impact cardholders who were granted an exception to purchase food for Student Programmatic Activities with a Procurement Card and currently have food-related Merchant Category Code (MCC) restrictions lifted on their account.

To prepare for this transition, please check the status of your T&E-Card to make sure it is active. If you do not have a T&E-Card, apply today to ensure it reaches you before the cutoff date. Visit the Travel and Entertainment Card Blink page for application guidance and FAQs.

Camp IPPS Recordings Posted

Thank you all for attending Camp IPPS travel & expense and procure-to-pay classes last week! If there are any sessions you missed or that you'd like to watch again, you can tune into our Camp IPPS 2022 Playlist on YouTube.

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

Internal Controls Office Hours

Every Monday

11:00am - 12:00pm

Join the Internal Controls Office Hours to ask questions regarding the internal controls guidance posted on the Best Practices in Internal Controls Blink page.

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, September 1, 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.

Equipment Asset Management Office Hours

Wednesday, September 7, 2022

8:30am - 9:30am

We invite you to attend the Equipment Management Office Hours to learn how to Dispose of equipment when it is no longer of use to your department or broken. Join us to learn more about equipment life-cycle management, ask questions and share your ideas to help us serve you better.

PPM Contract and Invoice Training

Tuesday, September 13, 2022

10:00am - 11:00am

Register for the upcoming comprehensive training course providing instruction on contract, event, and invoice creation and requirements. This virtual training is set to occur every 2nd Tuesday of the month at 10:00am. The next session is 09/13, and will reoccur on 10/11 and 11/08.

Use this link to register for the next webinar on 09/13 at 10:00am.

Concur: Event & Expense Reimbursements

Thursday, September 15, 2022 @ 9:00am - 11:00am

The course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. This course will be especially valuable for employees who host meetings and events and want to further their understanding of the expense reconciliation process via Concur. Also, those who previously utilized MyPayments for requesting employee reimbursements for business expenses may attend this course. Intended for preparers, meeting/event hosts, financial managers, and entertainment approvers who are familiar with Entertainment Policy BUS-79 and would like to learn about more advanced meetings and entertainment terminology and concepts.

Topics Covered:

- Learn how to submit event payment requests and employee reimbursements via Concur
- Review the process to submit event vendor payments
- Be able to view and reconcile Travel & Entertainment card transactions

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UC San Diego Travel: Before You Go

Thursday, September 22, 2022

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

UC San Diego Travel: Reporting Expenses
Thursday, September 22, 2022
1:00pm - 3:00pm
This course is 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 with Travel Policy G-28.

Topics Covered:

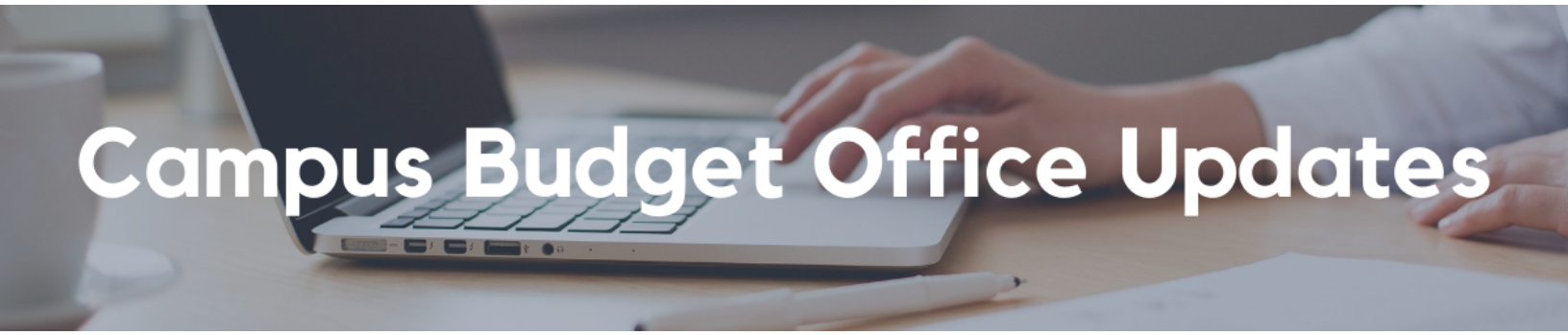
- Arranging for prepayment of fees, such as registration
- Making deposits, such as for hotels
- Reporting expenses
- Claiming traveler reimbursement

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!



FY23 Final Budget Data Now Available in OFC
The FY23 Final Budget from Oracle Planning and Budgeting (EPBCS) is **now available** for viewing and reporting in the OFC-production environment. As a reminder, core resources from the Campus will no longer be allocated on a monthly (1/12)

basis and are now allocated annually as a lump sum amount (starting July 1, 2022). In line with this change, the total annual budget including all funds planned has been loaded to the Jul-22 period in OFC production.

Budgets and core resource allocations in fiscal years 20/21 and 21/22 will remain posted as monthly (1/12) increments for historical purposes in OFC. Monthly budget data for all fiscal years is available in EPCBS.

Travel & Entertainment Card - Activating a New T&E Card
When activating your new Travel & Entertainment Card, you will be prompted to enter the last four digits of your Social Security Number but since we do not use Social Security Numbers on our accounts, you should simply use the last 4 digits of your UCPath ID number. If you have trouble activating your card, please reach out to us via Services & Support.

The Support Framework: Your Guide to Finding Help
Learning all there is to know about budget & finance can feel daunting.

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 User Group
- Knowledge Base Articles
- Community of Practice
- Published Information in Blink
- Training 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 request ticket in 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
- Submit a ticket to Budget & Finance Support
- Find the form in our Request 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 Suggestion Box
- Business Analytics Hub Help Page

View the full Support Framework on Blink.

UC San Diego
BUSINESS AND FINANCIAL SERVICES

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.

Visit Our Website | Subscribe to our YouTube | Contact Us

UC San Diego

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