Budget & Finance Weekly Digest



November 8, 2022 | 96th Edition

Announcements



UC San Diego Services & Support, Budget & Finance Request Forms
Beginning **Thursday, November 9, 2022**, Budget & Finance Request forms will be updated to make identifying and tracking your tickets a lot easier!

- The names and descriptions of each form have been updated to clarify when to use each form.
- Key information has been added to the description found under My Stuff → Tickets; for example:
  - Payee name
  - Total amount
  - Date of request

We hope this improves your experience and we welcome any additional Budget & Finance Enhancement Requests!

Timely Reconciliation of Travel & Entertainment Card Products
All Travel and Entertainment Card Product transactions (including T&E Card, CTS Air, CTS Hotel, and T&E - Temporary Virtual Card), are required to be reconciled within 45 days from the trip or event end date.

- Purchases that are made in advance of travel, such as flights and conference registrations should be added to the Expense Report that they belong to. This will push the 45-day reconciliation window forward to the travel end date that is noted in the expense report.
- Cardholders with transactions that have aged beyond 45 days, are subject to account suspension or closure.



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

Internal Controls Office Hours
Every Wednesday
10:00am - 10:30am
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
At this week's office hours, we will host a Fund Manager Bootcamp Training about UCPath-Oracle Integration. We will go over how it works, what can go wrong, and how to mitigate problems. Come and get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

Deconstructing the UC Travel Ecosystem
Wednesday, November 9, 2022
11:00am
Need to book travel, want to know which agency has access to all UC rates and benefits, seeking reimbursement, have questions on insurance or per diem – who you gonna call? This will not be a "how to" training, but rather an exploration of the program's many layers, which can be a great refresher for those coming back to travel or those who are new to travel, but is open to anyone interested.

Concur: Event Expenses & Other Reimbursements
Thursday, November 10, 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.

Reporting Workshop: Dashboard of the Week Series

Oracle: Buying and Paying for PO Requisitioners

Monday, November 14, 2022
11:00am - 12:00pm
Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include an interactive report demo, discussion of what questions the report can answer, opportunities to ask questions and walk through your use cases, and hear how others are using the dashboard or report. Next week's session will feature the **Default Project Payroll** report. This will be our last session of the year and we will be coming back in January 2023 for more sessions!

More information about the series and a full schedule can be found on the Reporting Workshop Blink page.

Thursday, November 17, 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.

UC San Diego Travel: Before You Go

Thursday, November 17, 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.

UC San Diego Travel: Reporting Expenses

Thursday, November 17, 2022
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.

2022 Year End Review

Wednesday, November 30, 2022 @ 10:00am - 11:00am
There were a lot of enhancements in Travel & Expense and Procure-to-Pay which came out of 2022. Join us in reviewing those enhancements and looking forward to the year 2023 by registering today!

Travel Perks

Wednesday, November 30, 2022
11:00am

Travel for Students on Study Abroad Programs

Wednesday, December 7, 2022
11:00am

Explore the many benefits provided in UC's contracts with the major airlines, hotels and car rental companies and learn how to take advantage of them when booking travel.

UC's contract with Student Universe provides a variety of benefits to our students and we will highlight those along with the exciting Airfare Deposit Program.

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!



Travel & Entertainment Process in Concur
With 2023 just around the corner, here are some Blink Pages that you can reference when planning future trips and events. And for all new employees or employees who just need a refresher, the Concur Basics Blink page is a great resource to have bookmarked in your browser of choice!

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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