Learning all there is to know about budget & finance can feel daunting.

Did you just receive a New/Replacement Procurement Card or Travel & Entertainment Card?

Join our Community of Practice (COP) for Budget, Finance, and Procurement.

For Travel and Entertainment-related charges, expense reports should be submitted within 45 days after the trip or event has occurred. All expenses related to the trip should be on the same expense report. All expenses related to an event are also to be included in the same report.

If the cardholder does not have access to the Procurement Card or wishes to be able to access their account details, they can do so by enrolling in the system. This option requires the cardholder to know details about their account, including billing address, telephone number, and other account information.

Budgeting system (EPBCS).

If you are responsible for preparing the budget for your Financial Unit in the Oracle Planning and Budgeting system, please consult with your Vice Chancellor Office. Departmental budget preparers (Concur Delegates) and approvers are encouraged to attend the following sessions:

Wednesday, January 18 @ 1:00pm - 3:00pm
Thursday, January 26 @ 1:00pm - 3:00pm
Thursday, January 26 @ 9:00am - 11:00am
Thursday, January 26 @ 11:00am - 12:00pm
Thursday, January 26 @ 4:00pm - 6:00pm
Thursday, January 26 @ 7:00pm - 9:00pm

The course provides an overview of UC San Diego travel policy and procedure, including summarized guidelines, resources, hands-on practice, and feedback to gain valuable, practical experience. Intended for fiscal administrators, fund managers and others who will be approving requisitions or invoices.

The course will be delivered in an instructor-led and in-person system training session for all campus budget preparers January 31 – February 15. Registration links will be available in next week's Digest.

The Project Panorama will be deprecated on Friday, January 13. Information accessed on the Panorama can be viewed via Knowledge Base Articles.

You can ask questions about sales and use tax, reportable income, income withholding tax, AP cost corrections, and supplier setup. Please take the time to stop by and interface with that team!

Do you miss QueryLink? Wish you could create your own ad-hoc queries with Cognos Analytics? Is your goal for 2023 to further your understanding of the expense reconciliation process via Concur. Also, those who previously utilized MyPayments will be able to view their transactions through the Concur tool, which will replace the Oracle Procurement search bar. Please take the time to stop by and interface with that team!

We are working to assist all travelers in the following ways:

- Be able to view and reconcile Travel & Entertainment card transactions
- Add non-Pin-protected cards
- Claiming traveler reimbursement
- Arranging for prepayment of fees, such as registration
- Checking PO and NonPO invoice status
- Receipting
d- Making deposits, such as for hotels
- Receiving credits through refund checks
- Checking PO and NonPO invoice status
- Closing POs
- Shopping for and purchasing goods and services
- Searching across UC San Diego requisitions and POs

Annual Survey for UC's Systemwide Travel Program

UC San Diego Travel: Before You Go

Please join us for a session on the morning of January 26. We will provide an overview of travel policy and procedure for the entering fiscal year. Topics will include: preauthorization and UC San Diego's instance of Concur Travel booking tool. Intended for travel arrangers, delegates, supervisors, and financial managers who are familiar with Travel Policy G-28 and would like to learn about more advanced topics.

UC San Diego Travel: Reporting Expenses

Please join us for a session on the afternoon of January 26. We will provide an overview of travel policy and procedure for the entering fiscal year. Topics will include: receipting, claiming reimbursement, and allowing travel to proceed. Intended for requisitioners, travelers, and financial managers who are familiar with Travel Policy G-28 and would like to learn about more advanced topics.

Online FINAH Cognos Training

Please join us for a session on the afternoon of January 26. We will provide an overview of the FINAH Cognos application. These meetings provide support for report developers, not report consumers.

We meet on Wednesdays and Fridays. You can ask questions about sales and use tax, reportable income, income withholding tax, AP cost corrections, and supplier setup.

Please register for a 1:1 Zoom session to meet with a member of the BI & Financial Reporting team who can answer your specific questions. These meetings provide support for report developers using the Financial Activity Hub.

Attend our upcoming meetings on the third Thursday of every month at 10 am. These meetings provide support for report developers, not report consumers.

We meet on the second Friday of every month at 11 am. These meetings provide support for report developers, not report consumers.

For conference calls or meetings, please use a modern web browser, such as Google Chrome. You may experience issues accessing the Knowledge Base Articles. Please contact the UC San Diego IT Help Desk at 858-534-6000 for further assistance. Use Google Chrome for the best experience with Concur.

By January 18th, 2023.

For questions or more information, please visit: https://www.budget.ucsd.edu/
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.