

# Budget & Finance Weekly Digest

August 15, 2023 | 134th Edition

## Announcements



### **CORRECTION: Travel Perks for University of California Employees - Alaska Airline**

The University of California Office of the President recently sent out a [promotion](#) from Alaska Airlines that would allow University of California travelers to reach MVP and higher status faster than the public can.

Unfortunately, there was some confusion on the terms and the automatic advancement upon registration was not part of the deal. Only members at regular status will see an upgrade to MVP. Those who are already MVP or higher will be entered in the promotion to EARN a higher tier after they have flown the necessary number of flights.

We apologize for any confusion this may have caused and hope that you are still able to take advantage of the program.

### **Oracle Procurement Purchasing Category Enhancements are Now Live**

Integrated Procure-to-Pay Solutions recently launched a Purchasing Category enhancement in Oracle Procurement so our professional buyers can better support you. While the impacts on the campus client experience are limited, you may notice a few minor changes:

- A few purchasing categories in Oracle Procurement have been added:
  - Services - Advisory
  - Services - Editorial & Publication Support
  - Services - Financial
  - Installation - Taxable
  - Installation - Non-Taxable
  - Landscape Maintenance Supplies
- A few purchasing categories in Oracle Procurement have been removed:

Purchasing Category	Alternative
Clinical Trials Services	Services - Clinical
Event Equipment Rental	Event Services (Taxable or Non-Taxable)
Event Site Rental	Event Services (Taxable or Non-Taxable)
Events Management	Event Services (Taxable or Non-Taxable)
Market Research	Services - Marketing
Patient Treatment/Care	Services - Medical or Services - Clinical
Services - Consulting	Services - Advisory (New Category) or contact Human Resources for ongoing contractor support.
Installation - Telecom	Installation (Taxable or Non-Taxable)
Installation - AV	Installation (Taxable or Non-Taxable)
Installation - Equipment	Installation (Taxable or Non-Taxable)
Installation - Furniture	Installation (Taxable or Non-Taxable)

- To reduce misrouted orders, please continue to review our [Blink page](#) for examples associated with purchasing categories

[Office Hours via Zoom](#) are available for Oracle Procurement three days per week for your support. While the expected changes for you will be minimal, we are available to you through [Services & Support](#) should you have any questions regarding your order.



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

#### Financial Accounting Program Information Sessions

[Tuesday, August 15 @ 10:00am - 11:00am](#)

[Thursday, August 17 @ 1:00pm - 2:00pm](#)

The UC San Diego [Financial Accounting Program](#) is a complementary professional development opportunity being offered to help you become more effective in your role. This program is currently offered at no cost to [eligible](#) career employees through

the end of the fiscal year (Spring 2024)!

You are encouraged to share this information with your teams, colleagues, and those who may be interested in participating in the full program or Financial Accounting for Non-Accountants (FAFNA) as a standalone course.

We appreciate the partnership with UC San Diego Division of Extended Studies and the support from supervisors across campus and health sciences.

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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**

We will not be holding Fund Management office hours on **Aug. 17th** due to the annual Staff Summer Celebration. See you next week!

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### **Concur: Event Expenses & Other Reimbursements**

**Thursday, August 17 @ 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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### **Financial Operations Office Hours**

**Friday, August 18 @ 9:00am - 10:00am**

Join the Financial Operations team this Friday for updates from Accounts Receivable, Strategic Design, Cash & Merchant Services and Equipment Management, Open Q&A. As always we will have open forum discussions, any updates we might have to share with you, and general Q&A sessions. We look forward to seeing you there!

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### **UC San Diego Travel: Before You Go**

**Thursday, August 24 @ 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
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### **UC San Diego Travel: Reporting Expenses**

**Thursday, August 24 @ 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 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
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### **IPPS Hot Topics: Move/Relocation Policy & Procedures**

**Wednesday, August 30 @ 10:00am**

This Hot Topics Training is great for department Move Coordinators who are in charge of assisting new employees with their Move/Relocation expenses. You will learn about the different move policies, how to find out which policy applies to your employee, reimbursable expenses versus non-reimbursable, the process in Concur to reimburse the employee/reconcile card charges, the taxability component associated with these expenses.

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### **Contract and Invoice Creation Training**

**Wednesday, August 30 @ 10:00am - 11:00am**

Find out about the PPM contract and invoice process. These resources and training are for individuals new to UC San Diego or those interested in refreshing their knowledge of the PPM contract and invoice process.

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### **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).

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**Have Finance-related questions?**  
Call the UC San Diego Finance Help Line.

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**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!



## Concur Walkthrough YouTube Playlist

Do you prefer visual guidance over written step-by-step instructions? Check out our [Concur Walkthrough Videos](#) YouTube Playlist! The number of videos in this playlist is growing by the day, so we encourage you to bookmark and share this YouTube playlist with your department.

## 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) 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 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 request 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 Support](#)
- 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
- Create & Cancel financial reporting enhancement

**Resources:**

- [Budget & Finance Support Box](#)
- [Business Analysis Hub Help Page](#)

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

UC San Diego  
RESOURCES FOR BUDGET & FINANCE

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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