

Budget & Finance Weekly Digest

July 5, 2023 | 128th Edition

Announcements



Oracle Fixed Assets Module Office Hours Monday July 10th

Next **Monday July 10, 2023**, will be the next session of Office Hours. Please join us at **10:05 AM** on [zoom](#) to learn more about the following topics:

- Cost Transfers for Assets
- Expenditure Type Corrections for Assets

Differential Income Account Use

Departments that are currently using **774010 – Differential Income Transfer to Reserve** to record Differential Income will only be able to use this Expenditure Type through the end of this Fiscal Year-End close 2022-23.

In order to have consistent Account use throughout Campus, all Departments will be required to use Account **773002 – Department Tax** for recording Differential Income incurred during the new Fiscal Year starting July 1, 2023. Expenditure Type 774010 – *Differential Income Transfer to Reserve* will be inactivated for the new Fiscal Year.

Resources

[KBA: How to Record Departmental Support Differential Income](#)

IPPS Advisory Committee Applications Open

Starting today, we are opening up our IPPS Advisory Committee (IAC) to evaluate membership for the next fiscal year. This committee, attended by several IPPS representatives including our Directors of Procurement and Disbursements/Travel, was originally established to work through ESR changes, enhancements and roadblocks. The committee meets every other Friday, 11:00 AM - 11:45 AM. IPPS uses this time for:

- Working through enhancement ideas
- Discussing problems or roadblocks we're experiencing and potential solutions
- Previewing upcoming developments before they're launched

- Reviewing complicated situations surfaced by IAC members which we either work out in the moment or follow-up with resolution after the meeting.

Membership in the IAC is a year-long tenure where members are asked to actively engage in discussions, bring a positive solution-oriented attitude, and participate in posting in the Teams Community of Practice. Posts would include tips and tricks, articles, and Blink pages. Occasionally, you might join focus groups or be asked to help us with escalated client issues that we're having difficulty navigating. If you have interest in being a part of this committee, please [fill out our IPPS Advisory Committee interest form](#) by 7/14.

AP & Concur Accruals or Fiscal Close

If you missed the recent Fiscal Close Bulletins, take a look at the [AP & Concur Accruals for Fiscal Close](#) Blink page for information on how accruals will be processed this year.

Click [here](#) (SSO required) to view the Concur accruals data. We are offering this special report because it joins the data from the Concur Expense Report and the Outstanding Card Charges report. We hope to offer this as a report in the BAH in the future.



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

[Fiscal Close Office Hours](#)

Every Wednesday @ 10:00am - 10:30am

From now until August 2nd, join the Fiscal Close Office Hours to ask questions and provide feedback regarding fiscal close activities.

[ECERT Effort Reporting Office Hours](#)

Every Wednesday 2:30am - 3:30pm

Come get your questions answered, system access setups, or helpful hints on the effort report certification process.

[Fund Management Office Hours](#)

Every Thursday @ 11:00am - 12:00pm

This week will feature a demo of the newly released **GL Fund Balances report**. Come get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

[Reporting Workshop: Dashboard of the Week Series](#)

Monday, July 10 @ 11:00am

Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include discussions and report demos to help address some of your frequently asked questions. There may also be opportunities to win prizes during the series! The next session will feature the **Award Project Task Personnel and PADUA** on how to review and correct sponsored project budgets.

IPPS Hot Topics: Concur Reporting

Wednesday, July 19 @ 11:00am

Have you gotten stuck before trying to get at data coming from Concur or even knowing what's available? Join us for our next session of Hot Topics to learn about the reports that exist for Concur and how best to use them.

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).



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**

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!*



Cognos Report Development Training

Are you interested in learning how to create your own queries and reports in Cognos using financial data? Does live training best suit your learning style? Complete [this form](#) to express your interest and availability for a training course by July 14. Training session invitations will only be made available to individuals who express interest on this form.

Can't spare three whole days for training? PDF manuals for self-paced training are available [here](#) under Online FINAH BI Tools Training.

Tips & Tricks

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's) are

Self-Service Resources:

- Your Immediate Supervisor
- [Budget & Finance User Groups](#)
- [Knowledge Base Articles](#)
- [Community of Practice](#)
- [Published Information on Blackboard](#)
- [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 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
- 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 Supervision Box](#)
- [Business Analytics Data Help Desk](#)

[View the full Support Framework on Blackboard](#)

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ADVANCING THE UNIVERSITY MISSION

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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