Responsibilities, identify their resources based on the following questions:

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

UCSD BI Consumer JR role is required to access the report. It contains links to commonly used reports. Find it on the Administration tab under Budget & Finance on bah.ucsd.edu. The report object that contains links to commonly used reports.

By popular demand and based on input from attendees of Fund Manager Office Hours, we have created a report object that contains links to commonly used reports. Faculty and staff will learn about the Concur processes for claiming travel expenses on Thursdays, July 14, 2022.

This course provides an overview of UC San Diego travel policy and the trip reconciliation procedure, including summarized guidelines and on-demand resources. Faculty and staff will learn about the Concur processes for claiming travel expenses on Thursdays, July 14, 2022.

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, tracking payments, 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.

This live course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expenses. Faculty and staff who travel or book business travel can further their understanding of preauthorization, booking travel via Concur, prepaying with the Travel & Entertainment Card, and how to take advantage of TripIt Pro. It is recommended that travelers and preparers also attend the Concur: Event and Expense Reimbursements.

At this week’s office hours, representatives from the Office of Contract and Grant Administration (OCGA) will demo the Research Administration Activity Dashboard and answer your questions about the recent reorganization of OCGA.

Join the Internal Controls Office Hours to ask questions regarding the internal controls guidance posted on the In Internal Controls Blink page. Every Monday @ 11:00am - 12:00pm.

Procure-to-Pay Office Hours

Every Thursday Monday, Wednesday, or Friday to ask questions about the new form.

We are working with Concur on Requests stuck in the “Pending External Validation” approval step. We hope to have this resolved within the next 48 hours. There will be no additional action required once resolved. Note that this will not impact your ability to submit requests or requests in other states of approval.

We are excited to announce a major enhancement to the Payment Request form in Services & Support! Attaching a separate financial information document to the Payment Request form can significantly improve the process of attaching supporting documents. This enhancement enables financial preparers to easily upload relevant documentation for the payment category selected and will walk you through the process (e.g. when Gifts & Awards is selected, information about the gift or award, such as a letter or purchase order, will be uploaded) as described in the Services & Support documentation.

With this enhancement we have taken advantage of Services & Support functionality to optimize the form’s performance by reducing the number of form-related operations and improving processing speed. This improvement will help prevent delays and ensure a smoother user experience for both preparers and preparers.

Please note the Update the UC San Diego Finance Help Line to make it more dynamic.

An enhancement to the Budget & Finance community.

Where can I get help?

What can I do on my own?

Click to access the Event Calendar, which showcases a consolidated view of Office Hours, Instructor-Led Training sessions, and Hot Topics.
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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