

# Budget & Finance Weekly Digest

July 12, 2022 | 79th Edition

## Announcements



### **Optimization of the Payment Request Form**

We are excited to announce a major enhancement to the Payment Request form in Services & Support! Attaching a separate PDF form to each request is no longer required. Detailed questions will appear right on the Services & Support form based on the payment category selected and will walk you through the process (e.g. when Gifts & Awards is selected, information about annual limits will appear). Note that supporting documentation is still required and Blink links are provided for additional guidance.

With this enhancement we have taken advantage of Services & Support functionality to optimize the form's performance by making it more dynamic.

Stop by the [Procure-to-Pay Office Hours](#) Monday, Wednesday, or Friday to ask questions about the new form.

### **"Pending External Validation" Delay in Concur**

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 Travel bookings. Thank you for your patience.

# Training & Support



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

## **Internal Controls Office Hours**

**Every Monday @ 11:00am - 12:00pm**

Join the Internal Controls Office Hours to ask questions regarding the internal controls guidance posted on the [Best Practices in Internal Controls Blink page](#).

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## **Fund Management Office Hours**

**Every Thursday**

**11:00am - 12:00pm**

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.

## **Concur: Event and Expense Reimbursements**

**Thursday, July 14, 2022**

**9:00am - 11:00am**

This live course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. Intended for preparers, hosts/payees, and financial managers who are familiar with policy and would like to learn about the expense reconciliation process in Concur.

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## **Oracle: Buying and Paying for PO Requisitioners**

**Thursday, July 21, 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.

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

Thursday, July 28, 2022

9:00am - 11:00am

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 Triplt Pro. It is recommended that travelers and preparers also attend the *UC San Diego Travel: Reporting Expenses* course before the trip concludes.

### [UC San Diego Travel: Reporting Expenses](#)

Thursday, July 28, 2022

1:00pm - 3:00pm

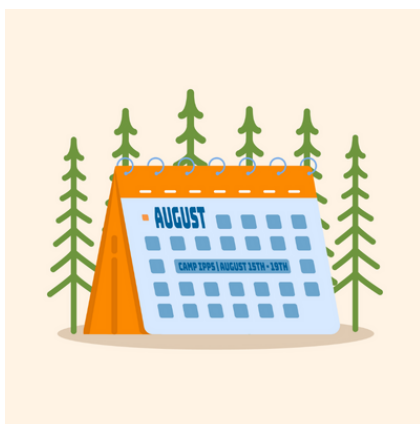
This course provides an overview of UC San Diego travel policy and the trip reconciliation procedure, including summarized guidelines and on-demand resources. Faculty and staff will learn about the Concur processes for claiming travel expenses on a Travel Expense Report.

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### [Camp IPPS](#)

August 15-19, 2022

Camp IPPS is back with 30 instructor-led zoom courses spanning hot topics in Oracle, Concur, Payables, Logistics, and more! Mix and match classes or attend them all in this immersive, camp-themed training week.



### [Registration Now Open!](#)

The training is "in-tents"! Plan ahead.

Register early to add classes and Camp IPPS events to your calendar.



**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!



# BI & Financial Reporting

## 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. Find it on the Administration tab under Budget & Finance on bah.ucsd.edu. The UCSD BI Consumer JR role is required to access the report.

All Reports	<b>Administration Panoramas</b>	Budget & Fin
Department Panoramas	Faculty and Researchers	Fi
General Ledger & Account Info. Panoramas		Gift Funds
Receivables & Cash Operations Panoramas		

Commonly Used ReportsNew

Contains a curated list of the most commonly used reports

[View Details](#)[Launch >](#)

# Tips & Tricks

## The Support Framework: Your Guide to Finding Help

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

**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 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 request ticket in 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 [finance.support@ucsd.edu](mailto:finance.support@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 Suggestion Box
- Business Analytics Hub Help Page

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

UC San Diego  
BUSINESS AND FINANCIAL SERVICES

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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