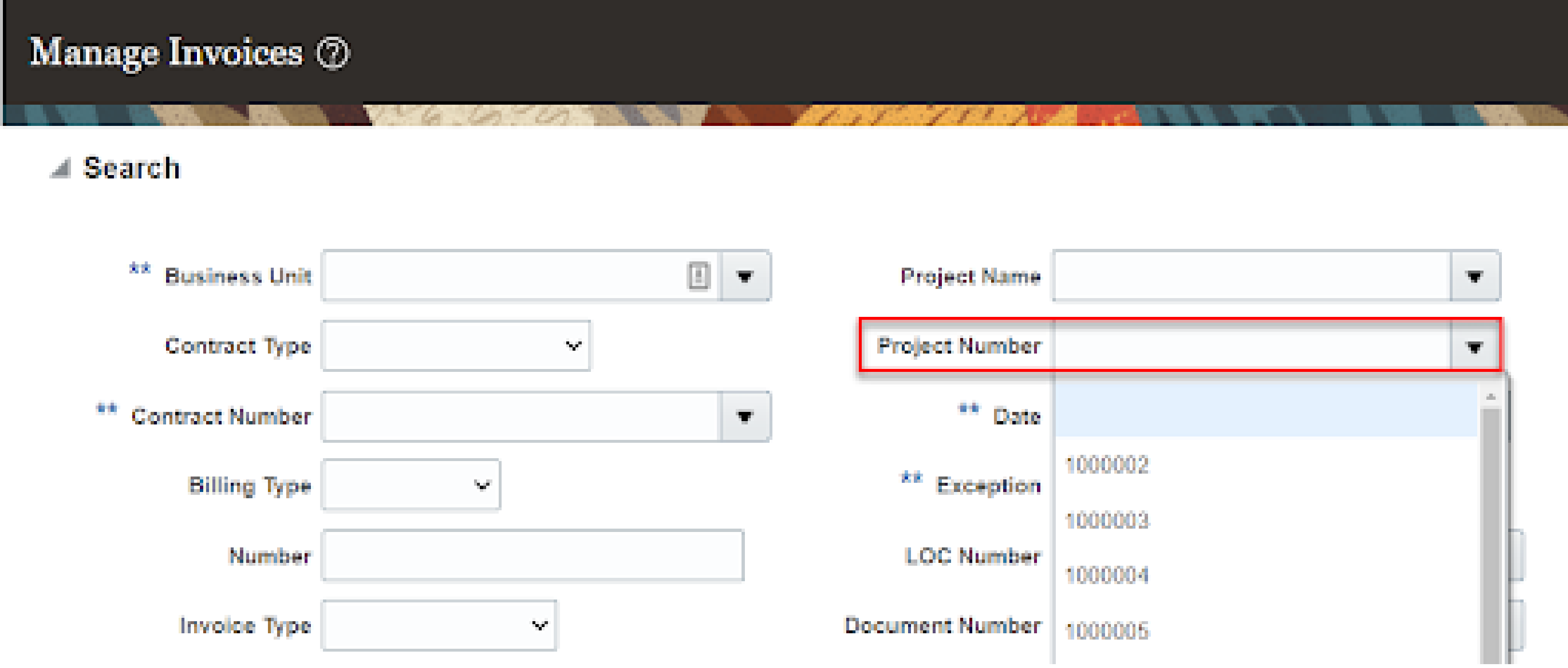
September 20, 2022 | 89th Edition

Are You Interested in Launching an e-Market Storefront for your Department?
Transact e-Market is a new campus relationship that provides an online storefront solution for departments. Items such as tickets, conference fees, merchandise, donations and membership fees can be offered through the eMarket. Student Financial Solutions is looking for a few departments to participate in the pilot program this Fall. To be considered, fill out this survey by **Friday, September 30**. Questions? Contact James Her at jamesh@ucsd.edu.

Search by Project Number in Manage Invoices Search
When searching on the Manage Invoices page in Projects and Awards, the Project Number is now available as a search variable, allowing users to search for specific invoices by the project number as an alternative to project name.



PPM Billing Features Launching 09/26/22!
New PPM Billing features will be launched in PPM starting Monday, September 26:

- **PPM Recurring Billing**
  - Recurring billing allows users to set up a contract in Oracle for invoices to automatically generate per a designated Bill Cycle frequency.
  - For more information, read the How to Set Up PPM Recurring Billing KBA.
- **PPM Multiple Services**
  - Multiple Services gives users the ability to provide more granular information about the services being provided and billed.
  - This also includes the ability to reference an external customer PO# per event, instead of just the contract line level.
  - You can now add the information on the Event, which will be displayed on the AR Customer Invoice.

New Blink Page on Understanding Project Costs
In support of continuous improvement, a new Blink page has been created to help users, both experienced and new, understand more in detail about Project Costs. This contains experts from the PPM User Guide and is intended for those that create costs as well as those that review costs in PPM. View the Blink page here!

New Request User Interface (UI) in Concur
Starting October 1, the Request Module will now have a similar look and feel to the Expense Module. Here are some unique features of the new Request UI:

- Active Requests will show on the “home page” of Requests and they are chronological by creation date whereas Expense reports are displayed by status (Returned, Not Submitted, Submitted)
- A Request will now include a link to the Expense report(s), when there is one associated with it. In the old/current Request UI, there is no way to identify which expense reports were associated with a Request.

Here is a quick look of how the new Request UI will look starting October 1.

Please join us during Office Hours on Wednesday, September 28 and Wednesday, October 5, for a quick demo on how to navigate the new Request Module. The demo will begin at 9:10am. Refer to the Office Hours schedule in Blink for the Zoom link (scroll down to Procure to Pay / Travel and Expense). Should you have any questions regarding this change, please submit a Services & Support ticket.

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.

Fund Management Office Hours
Every Thursday
11:00am - 12:00pm
At this week's office hours, come see a demo of the upcoming GL Project Balances report makeover being released on September 27 and get your questions answered about how to use it and what to use it for.

At next week's office hours, we will review the newly released Project Management Dashboard as well as accompanying changes to the Expanded Project Summary, Faculty and Researcher Dashboard, and GL-PPM Reconciliation reports.

PPM Contract and Invoice Training: Make-up Session
Wednesday, September 21 @ 10:00am - 11:00am
Due to a last-minute cancellation of the 09/13 PPM Contract and Invoice Training session, a make-up session will be provided to those available to attend. This comprehensive training course will provide instruction on contract, event, and invoice creation and requirements. If you are unable to attend this make-up session, this training will reoccur on 10/11 and 11/08.

UC San Diego Travel: Before You Go
Thursday, September 22, 2022
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.

UC San Diego Travel: Reporting Expenses
Thursday, September 22, 2022
1:00pm - 3:00pm
This course is 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.

Upcoming Travel Webinars
Wednesday, September 21, 2022 @ 11:00am
JetBlue Airways will focus on their growth out of Los Angeles (LAX) and the new code share partnership with American Airlines. They may also share info on the new Spirit Airlines merger. All attendees will be entered to win status upgrade to Mosaic (3 winners will be selected)

Wednesday, September 28, 2022 @ 11:00am
Hertz Car Rentals will discuss their partnership with UC on sustainability goals, plus offer updates on the car rental industry and Gold Plus program benefits. All attendees will be entered to win ONE of the following: $100 Hertz certificate (1 winner) and 4 winners will get status upgrades (winners will go up one tier from their current status up to and including President's Circle Gold)

Hot Topics: Travel Booking
Wednesday, September 28 @ 10:00am - 10:45am
Join IPPS for our next session of Hot Topics! Learn how to book travel the Triton way, including the benefits of booking with Concur, Balboa, and Kahala.

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

(858) 246-4237 **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!

Upcoming Dashboard Release: Project Management

The new Project Management Dashboard launching on Tuesday, September 27 will offer fund managers one place to do a complete analysis of a portfolio of projects, including GL and PPM balances, variance analysis, commitments, payroll reconciliation, and expenditures over time.

Upcoming Report Release: GL Project Balances

The GL Project Balances Report will be relaunching on Tuesday, September 27 with additional features. The following changes have been made:

- This will now be a standalone report accessed directly from BAH; it will no longer reside in the Project Panorama.
- The report will include PPM commitments, payroll projections, and balances over time.
- New GL balance calculations will include YTD rather than ITD Capital Asset purchases.

For more information, view our recent announcement detailing important upcoming releases and changes.

Reporting Workshop: Dashboard of the Week Series

Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include an interactive report demo, discussion of what questions the report can answer, opportunities to ask questions and walk through your use cases, and hear how others are using the dashboard or report.

Kick off the series with us on **Monday, October 3** as we review the Project Management Dashboard!

Scheduled sessions:

- Monday, October 3 @ 10:00am - 11:00am, Project Management Dashboard
- Tuesday, October 11 @ 10:00am - 11:00am, Expanded Project Summary
- Monday, October 17 @ 11:00am - 12:00pm, Transaction Details Report

The full schedule of upcoming training sessions will be posted soon. Stay tuned!

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 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 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.

Visit Our Website | Subscribe to our YouTube | Contact Us

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