28. Travelers, preparers (Concur Delegates) and approvers. The course provides an overview of UC San Diego travel policy and
1:00pm - 3:00pm
UC San Diego Travel: Reporting Expenses

Learning all there is to know about budget & finance can feel daunting.
The full schedule of upcoming training sessions will be posted soon. Stay tuned!
Kick off the series with us on
Reporting Workshop: Dashboard of the Week Series
For more information, view our
changes have been made:
The GL Project Balances Report will be relaunching on Tuesday, September 27 with additional features.
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
Upcoming Dashboard Release:
Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer
concerns.
Wednesday, September 21, 2022 @ 11:00am
Upcoming Travel Webinars
Concur Travel terminology and concepts.
travelers, and financial managers who are familiar with Travel Policy G-28 and would like to learn about more advanced
preauthorization and UC San Diego's instance of Concur Travel booking tool. Intended for travel arrangers, delegates,
be especially valuable for employees who travel or book business travel and want to further their understanding of travel
The course will include an in-depth explanation of topics covered in the Concur Travel and Expense eCourse. This course will
9:00am - 11:00am
Financial Solutions is looking for a few departments to participate in the pilot program this Fall. To be considered,
Transact e-Market is a new campus relationship that provides an online storefront solution for departments. Items such as
Are You Interested in Launching an e-Market Storefront for your Department?
Monday, October 17
Tuesday, October 11
Are You Interested in Launching an e-Market Storefront for your Department?

When searching on the Manage Invoices page in Projects and Awards, the Project Number is now available as a search
level.
and billed.
Multiple Services gives users the ability to provide more granular information about the services being provided
PPM Recurring Billing

in PPM starting Monday, September 26:
PPM Multiple Services
PPM Recurring Billing

You can now add the information on the Event, which will be displayed on the AR Customer Invoice.
by

Starting October 1
D. The Request Module will now have a similar look and feel to the Expense Module. Here are some unique

New PPM Billing features will be launched in PPM starting Monday, September 26:
PPM Multiple Services
PPM Recurring Billing

A Request will now include a link to the Expense report(s), when there is one associated with it. In the old/current
A Request will now include a link to the Expense report(s), when there is one associated with it. In the old/current

New Blink Page on Understanding Project Costs

Will the expanded project summary now be automatically included in the project summary? Yes. The expanded project summary will now be included as part of the project summary. This includes the ability to view and edit the project summary from the project summary page. The expanded project summary can also be accessed directly from the project summary page.

The report will include PPM commitments, payroll projections, and balances over time.
This will now be a standalone report accessed directly from BAH; it will no longer reside in the Project Panorama.

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

Would you like to be a part of the project summary dashboard pilot? If you would like to be included in the pilot program, please fill out the following.

You can also submit a

Request UI, there is no way to identify which expense reports were associated with a Request.
A Request will now include a link to the Expense report(s), when there is one associated with it. In the old/current
A Request will now include a link to the Expense report(s), when there is one associated with it. In the old/current

If you have any questions, please contact the UC San Diego Finance Team.
Finance-related questions? Call the UC San Diego Finance Help Line.