

# Budget & Finance Weekly Digest

January 24, 2023 | 105th Edition

## Announcements



### Non-Event Reimbursement Expense Report Processing Time

IPPS is no stranger to the staffing shortages many of us at UC San Diego are experiencing. As a result, we must make some adjustments and extend the processing time to approve non-event out-of-pocket expense reimbursement requests. Submitters should anticipate a **minimum** processing time of 10 business days from the date the request is received by IPPS, provided that required receipts and valid business justifications are included. Please know that this was not a hasty decision and we are doing everything in our power to ensure you are being properly supported. We are currently processing out-of-pocket expense reimbursement requests received in late December 2022 and are working diligently to become current.

To avoid out-of-pocket expenses and a delay in receiving reimbursements, use one of the university's purchasing/payment channels such as the [Procurement Card](#), [Amazon Business](#) and [Oracle Procurement](#). Reference our [Procure-to-Pay Decision Matrix](#) and the [Procurement Card](#) Blink page for more information.

### Flying on Federal Funds?

Federal regulations require the use of U.S. carriers for travel that will be reimbursed from federal grants and contracts, including federal-flow-through contracts and grants. Before making arrangements for air travel for UC San Diego business, find out about the funding type and, if applicable, ensure the booking is in accordance with the Act. If you feel an [exception applies](#), consult with your business office as certification may be required. Balboa Travel and Kahala Travel are able to assist in flight selections, but compliance with the Fly America Act is the responsibility of each department. Concur displays compliant flights in the flight search results when you click on the shield icon or the information icon.

JetBlue

jetBlue 07:52 AM SAN

jetBlue 08:55 AM LGW

Fly America Act

This option is Fly America Act with Open Skies Exceptions compliant.

4h 18m

3h 51m

Preferred Airline

More fares/details

Blue Basic

\$1,007.05

Select

Least-Cost Logical

JetBlue

jetBlue 07:52 AM SAN

jetBlue 08:55 AM LGW

Info

✓

This trip conforms to your company travel rules.

i

These flights are Fly America Compliant

4h 18m

3h 51m

Preferred Airline

More fares/details

Blue Basic

\$1,007.05

Select

Least-Cost Logical

### Cost Transfer Notifications

As part of the 22D release in December, there was an automatic format update to Cost Transfer email Notifications. This change includes more information for end users. In addition to this Oracle-delivered update, we are working to customize the Cost Transfer notification to provide as much information as possible to support approvers. Current timeline for UCSD specific customizations is the end of February.

### User Name on select Cost Transfers

A user has reported that some cost transfers are referencing the Initiated By and Approved By as a different user than the person who actually took action. This has been reported to Oracle and they are working on correcting this bug. This does not seem to be a widespread issue but if you do observe this issue, please know that we are already working with Oracle on it. Feel free to submit a [Services and Support](#) request if you have any questions.



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

[Fund Management Office Hours](#)

**Every Thursday**

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

Come and get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

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### **IPPS Hot Topics: Oracle Procurement Enhancements**

**Wednesday, January 25 @ 10:00am – 11:00am**

Learn how to navigate the enhancements coming to Oracle Procurement in January 2023 including redesigned request forms, the ability to add new lines to existing Purchase Orders, and Advanced Search replacing the Oracle Procurement catalog.

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### **Oracle: Buying and Paying for Goods & Services**

**Thursday, January 26 @ 9:00am - 11:00am**

This course will be especially valuable for employees who want to further their understanding of buying on campus or those who will be approving requisitions or invoices. Instruction will involve an introduction to Oracle Procurement as well as hands-on practice and feedback to gain valuable, practical experience. Intended for fiscal administrators, fund managers and financial managers who are familiar with sponsored award management on campus and would like to learn about more advanced buying terminology and concepts.

Topics Covered:

- Shopping for and purchasing goods and services
  - Searching across UC San Diego requisitions and POs
  - Approving invoices and requisitions
  - Closing POs
  - Processing NonPO payments through Oracle Procurement
  - Checking PO and NonPO invoice status
  - Receiving credits through refund checks
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### **UC San Diego Travel: Before You Go**

**Thursday, January 26 @ 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.

Topics Covered:

- Review the process to request travel preauthorization via Concur Request
  - Be able to request a new University Travel & Entertainment Car
  - Learn how to book travel via Concur Travel
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### **UC San Diego Travel: Reporting Expenses**

**Thursday, January 26 @ 1:00pm - 3:00pm**

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 to Travel Policy G-28.

Topics Covered:

- Arranging for prepayment of fees, such as registration
- Making deposits, such as for hotels
- Reporting expenses
- Claiming traveler reimbursement

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

**Monday, January 30 @ 11:00am - 12:00pm**

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. Next week's session will feature the **Expanded Project Summary**.

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### **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.

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**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

## **New Transaction Details Report Bug Fixed**

The Transaction Details report “PI/PM/TM” prompt was only producing transaction results for PIs and PMs. This has now been fixed. Thank you to a campus client for letting us know.

# Campus Budget Office Updates

**New** 2023-24 Campus Budget Development Cycle Begins Late January. Training Registration is Now Open!  
**REGISTER NOW!**

[Oracle Budget: Budgeting Salaries and Benefits for Admin Units](#) - Web Based Application *In Person or Zoom Option*

[Oracle Budget: Budgeting Salaries and Benefits for Academic Units](#) - Web Based Application *In Person or Zoom Option*

[Oracle Budget: Non-Compensation Expense Planning](#) - Web Based Application *In Person or Zoom Option*

[Oracle Budget: Budgeting Salaries & Benefits in Smart View](#)

[Oracle Budget: Budgeting Non-Compensation in Smart View](#)

[Oracle Budget: Budgeting Capital Projects](#)

[Oracle Budget Data: Smart View Ad Hoc Tips and Tricks](#)

[Oracle Budget Data: Smart View Ad Hoc Querying](#)

**Need or Know Someone Who Needs Access to EPBCS?** Request access via the Services and Support portal  
<https://blink.ucsd.edu/finance/resources-training/get-started/access-requests.html>.

**Who is a Budget Preparer?** Budget preparers are individuals assigned by their department to create and manage financial unit budgets. The Budget Preparer role could be responsible for budget entry or final review & approval. Not sure if you're responsible for preparing the budget for your Financial Unit in the Oracle Planning and Budgeting system? Please consult with your Vice Chancellor Office.

**Join our Community of Practice (COP)** - The [Budget and Planning COP channel](#) audience includes Budget Preparers identified by each Vice Chancellor Office with responsibility to create Financial Unit budgets within the Oracle Planning and Budgeting system (EPBCS).

## 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 [financesupport@ucsd.edu](mailto: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](#)

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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