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Budget & Finance Weekly Digest

April 12, 2022

66th Edition

Announcements

Oracle System Maintenance

Oracle will be down for scheduled maintenance on **Friday, April 15, 2022** from **7:00pm to 10:00pm**.

VPN Requirement Removal

Cognos and Tableau will be unavailable **today, Tuesday, April 12, 2022** from **6:00pm to 9:00pm** to replace the VPN requirement with a DUO connection. Cognos reports (such as the Faculty and Researcher Panorama, Default Project Payroll, GL-PPM Reconciliation, DOPES, etc.) will be unavailable at this time. DUO will be applied to the following BI environments:

- Tableau Production
- Cognos Production
- Cognos QA

No changes to reports or report links will occur. Users who have not used DUO will need to register. For any questions and concerns, please contact its-bia@ucsd.edu.

Human Subject Compensation: Final Call To Return Unused Scrip Checks
All Scrip checks were stale dated as of June 19, 2021, and are no longer negotiable. If you have any outstanding items left and wish to receive funds back, all items must be received no later than May 31, 2022.

To return unused Scrip, write VOID on the face of the checks and mail them to Disbursements, MC 0955. Please include the following information:

- The original MyPayments request number
- The full COA in which you'd like the funds to be returned to

Access Issues to Oracle & Concur for New Hires Resolved
Last week we experienced some issues with a UCPath report that is used to create new user profiles in Oracle and Concur. **The issue has been corrected**. Please have new hires or anyone that changed departments in the last two weeks try logging into Oracle and/or Concur this week. If they continue experiencing issues logging in, please have them submit a ticket.

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
This week, we will demo the Expanded Project Summary that will be released on April 19. The Expanded Project Summary displays information for a single award, project, or task, including expenditures by month, cost details, commitment details, payroll details, payroll projection details, and General Ledger transaction details.

UC San Diego Travel: Before You Go
Thursday, April 14, 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 TripIt 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, April 14, 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.

Financial Operations Office Hours: Introducing Financial Operations
Friday, April 15, 2022
9:00am - 10:00am
This Friday, we will introduce you to the Financial Operations team and our services. We will then have an open Q&A session for any Accounts Receivable, Cash, PPM or Equipment Management questions. We look forward to seeing you there!

Equipment Asset Management Office Hours
Tuesday, April 19, 2022
8:30am - 9:30am
This week's office hours will include an Equip*Minute* segment on Physical Inventory, along with the Validation feature in CAMS.

Fiscal Year Close Preparations
Thursday, April 28, 2022
9:00am - 10:00am
Learn how best to prepare your transactions to meet the fiscal year deadlines for the Procure-to-Pay and Travel & Expense spaces in our next Hot Topics session.

In Case You Missed It!
Essentials for Equipment Life-Cycle Management
This webinar, hosted by Jamie Wheat & the Equipment Asset Management team, provided staff, faculty, and the research community with the essentials for managing inventorial equipment (property) owned by or in the custody of UC San Diego. Click the link above to watch the recorded webinar!

Call the UC San Diego Finance Help Line!

We'll answer your questions or find a solution together.

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!

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 Find Answers?

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

Resources:
- Attend an Office Hours session
- Contact the Finance Help Line
- Submit a request ticket in Services & Support

TIER 2 — Where Do I Go to Submit a Request?

Applies to you if you:
- Have a question that is unable to be answered in Tier 1
  - These questions typically require research
- Need to process a transaction in Services & Support
  - E.g. "I need you to process/approve/route…"
- Identify something that does not seem to be working properly

Resources:
- Find the form in our Request Catalog to process your transaction request

TIER 3 — Where Do I Go to Request an Enhancement?

Applies to you if you require:
- Report or System Enhancements including:
  - Advanced Configuration
  - Security Administration
  - Functional Integration

Resources:
- Enhancement Request Form
- 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 **find answers**?
- Where do I go to **submit a request**?
- Where do I go to **submit an enhancement or idea**?

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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