Management of your preferences

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Budget & Finance Weekly Digest

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial services and resources that we have at UC San Diego. Each week, we feature information on common financial processes and tools, provide updates on Oracle system changes, and remind users of upcoming events.

Airbnb Experiences

Event planners can use their Travel & Entertainment Card for Airbnb Experiences by providing the COA/PO/ETAF information.

String elements will display alongside the amount that will be charged to the user. Users can see a snapshot of all of the allocations made on an Expense Report.

Viewing Allocations

Tips & Tricks

Budget & Finance provides tools for team building, celebration, or recognition events.

Planning a Gifting Event

- Use the Web App's ‘Customize’ function to add the string to the bottom of the expense report. You will then be prompted to enter the COA/PO/ETAF information.
- The budget impact is also displayed in the expense report.
- Use the ‘Save as Custom’ option to save your customized expense report.

Training & Support

Thank you for attending the Financial System Implementation – General Projects event on March 18. The presentation materials are now available in the UC Learning Center.

Register today and join the Travel team as they go over Concur Travel & Event Planning to Travel? Jet Over to the UC Learning Center!

Concur Travel & Expense

Join us for the third webinar in a series to learn more about the General Ledger.

Fund Management: General Ledger

Join us for the second webinar in a series of fund management training to learn more about the General Ledger.

Monday, March 29, 2021 @ 9:00am - 10:30am

Best practices, provide a live demonstration, and host a Q&A session.

Please note that you can also search “Concur” in the UC Learning Center to browse through instructor-led Concur courses.

About the Weekly Digest

Each Tuesday important updates related to the Financial Information System Implementation – General Projects are issued. To receive the digest, subscribe to the email list.

Contacts

UCSD Travel: Reporting Expenses
UCSD Travel: Before You Go
Planning to Travel? Jet Over to the UC Learning Center!
Planning a Gifting Event
Training & Support
Concur Travel & Expense
Concur Enhancement: Invoice Information
New PO Supplier Email
Oracle Release 21A - Campus Notification
PPM Budgets for General Projects

You can start seeing these changes for Concur documents approved as of 3/18.

The purpose of adjusting PPM budgets is to ensure that departments have the appropriate funds to support their projects.

We hope this update is welcomed news and alleviates some stress for departments. We will continue to evaluate invoice tolerance settings to ensure we are appropriately handling overpayments.

Improving Visibility

Administrative Improvements

Please note that Project Managers will receive an automated email whenever they are assigned as the manager of a project.

We will continue to evaluate invoice tolerance settings to ensure we are appropriately handling overpayments.

Based on our research, we do not think we released invoices where the billed amount was not truly owed to the supplier. However, given the volume of transactions, we recognize that there might be cases where we were billed incorrectly and we will help you recover those funds. If you become aware of an overpayment, please submit a file.