Budget & Finance Weekly Digest

February 7, 2023 | 107th Edition

Announcements

Financial Accounting Program: Upcoming Information Sessions
We invite you to hear more about the Financial Accounting Program by attending an upcoming Information Session for the following dates. Please register using links below:

- Tuesday, February 14, 2023 @ 10:00am - 11:00am
- Thursday, February 16, 2023 @ 1:00pm - 2:00pm

This program is currently being offered at no cost to you! We encourage you to share this information with your teams, colleagues, and those who may be interested in participating in the program or taking the assessment. We appreciate the partnership with UC San Diego Division of Extended Studies and the support from supervisors across campus and health sciences.

Oracle Procurement - Invoice Price Discrepancies
UC San Diego's agreement suppliers provide regularly scheduled catalog updates with new items and prices. Many of these updates occur at the start of the year and may lead to a brief trend of invoices with different pricing. Requisitions in flight, varied release dates, and approval issues are sometimes the cause. Procurement teams were alerted to several recent price mismatches with the Cell Signaling Technology catalog in Advanced Search and have resolved the errors. If you encounter any price discrepancies within Advanced Search please submit a Services & Support case so we can help identify and fix any residual issues.

Guidance on Resource Allocation Process for Department
A new article in Services & Support has been published to provide guidance on the resource allocation process for departments. As a result, the Resource Transfer Request Form will be taken down and departments will need to refer to the

new article for guidance.

Who will be impacted?
Departments using the resource allocation process

Resources
See KB0034341 - Guidance on Resource Allocation Process for Departments

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
At this week's office hours, Stephanie Chernau will be sharing proposed changes to how committed costs are managed in Concur and what to do today, before the changes are implemented. Come get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

Concur: Event Expenses & Other Reimbursements
Thursday, February 9 @ 9:00am - 11:00am
The course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. This course will be especially valuable for employees who host meetings and events and want to further their understanding of the expense reconciliation process via Concur. Also, those who previously utilized MyPayments for requesting employee reimbursements for business expenses may attend this course. Intended for preparers, meeting/event hosts, financial managers, and entertainment approvers who are familiar with Entertainment Policy BUS-79 and would like to learn about more advanced meetings and entertainment terminology and concepts.

Topics Covered:

- Learn how to submit event payment requests and employee reimbursements via Concur
- Review the process to submit event vendor payments
- Be able to view and reconcile Travel & Entertainment card transactions

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Reporting Workshop: Dashboard of the Week Series
Monday, February 13 @ 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 **GL-PPM Reconciliation.**

UC San Diego Travel: Before You Go

Thursday, February 16 @ 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 Card
- Learn how to book travel via Concur Travel

UC San Diego Travel: Reporting Expenses

Thursday, February 16 @ 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

IPPS Hot Topics: Concur on Your Device

Wednesday, February 22 @ 10:00am - 11:00am

Learn about various mobile and electronic features available with Concur that can make your travel and reconciliation easier.

Oracle: Buying and Paying for Goods & Services

Thursday, February 23 @ 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

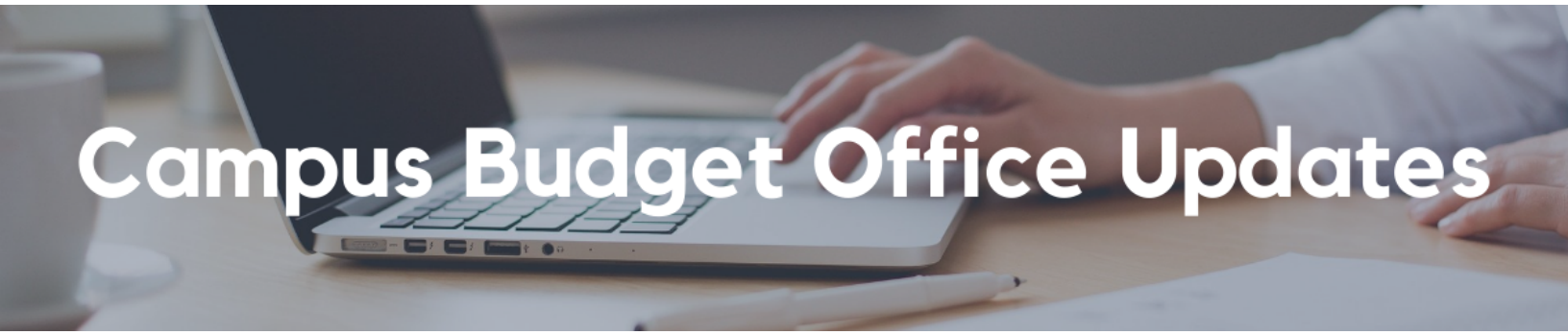
Reporting 1:1 Sessions
Sign up for a 1:1 Zoom session to meet with a member of the BI & Financial Reporting team who can answer your specific questions about financial reporting and dashboards/panoramas in the Business Analytics Hub (BAH).

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

(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!



The 2023-24 Campus Budget Development Cycle is Underway - Don't Forget to Register for Training!

REGISTER NOW!

Web-Based Application (In Person or Zoom Sessions):
Oracle Budget: Budgeting Salaries and Benefits for Admin Units
Oracle Budget: Budgeting Salaries and Benefits for Academic Units
Oracle Budget: Non-Compensation Expense Planning

Smart View Application (Zoom Sessions):
Oracle Budget: Budgeting Salaries & Benefits in Smart View
Oracle Budget: Budgeting Non-Compensation in Smart View
Oracle Budget: Budgeting Capital Projects

Smart View Reporting (Zoom Sessions):
Oracle Budget Data: Smart View Ad Hoc Tips and Tricks (Beginner)
Oracle Budget Data: Smart View Ad Hoc Querying (Intermediate/Advanced)

NEW! - Oracle Budget: Budgeting at UCSD
This new self-paced training course covers the use of both the web application and Smart View to build your budget in EPBCS. Now available on UCLC.

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).

NEW! Tips for Writing a Strong Business Purpose
A key component of a successful Travel & Entertainment expense report is a strong and valid Business Purpose. The T&E Office has recently seen an influx of expense reports with business purposes that are lacking in details which cause a delay in the review and approval process. When providing a business purpose, it is important to present how attending the business trip or hosting the event is beneficial to the University and aligns with the major functions of teaching, research, patient care or public service, or to any other substantial and bona fide University activity. The more detailed and compelling the justification in the initial submission, the less likely that our office would need to reach out to obtain clarification or send the report back. Below are examples of well-documented business purposes that departments have included in their expense reports. These concise but detailed explanations helped move the process along more efficiently.

- Attended the XYZ Conference to present our research findings and collaborate with other investigators in the field of XYZ
- Hosted the ABC Event to welcome and support new UC San Diego Alumni. This was a great opportunity to connect our new Triton alumni with other Tritons in the region and build mentorships with incoming and current students.
- Retirement celebration event for Employee Z to recognize 30 years of dedicated service to UC San Diego

- Staff event for the XYZ team to celebrate recent fiscal year successes and conduct team building activities
- Invited to the ABC Conference as the keynote speaker in City A. We then learned of an unexpected opportunity to meet with a potential donor in City B thus needed to purchase last minute airfare which was slightly higher in cost due to the lack of advanced notice.

NEW! Travel Allowance Per Diem Reminders

For foreign trips involving multiple locations, group trips of three or more travelers, or when claiming actuals, one has the option of not using the Travel Allowance feature in Concur. Should you choose not to use that feature, please be sure to attach the published Per Diem rate for the destination location(s) from the US Department of State site.

For more information, see the Per Diem (Travel Allowance) Blink site.

NEW! Chartstring vs Project on a Concur Expense Report

If a Concur expense report is submitted with chart string (CoA) information that is different from the project and task designated on the Concur expense report, Oracle will actually post the transaction against the correct chart string associated with the project and task.

What does this mean? Approvers do not need to spend time trying to update incorrect chart string information associated with expense reports in their Concur queue (e.g. the fund & function fields), as long as the correct Financial Unit, project and task are entered on the expense report.
Concur does not currently have a way of associating the chart string with POETAF fields. We are working on the ability to make the chart string optional while completing an expense report, which we hope will save time and make this process easier.

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.

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