Budget & Finance Weekly Digest

August 23, 2022 | 85th Edition

Announcements

PADUA 2.0 Task Updates Now LIVE!
Launched on **August 22, 2022**, additional features of the Project and Award Data Update Application (PADUA) tool are now available. Users are now able to Create New Tasks, Update Task Names, Update Task End Dates, and Update Task Personnel. The How to Use PADUA 2.2 KBA has been updated with these new features. Additionally, a short 5 minute training video can be found here.

New KBA: Closing Projects and Tasks
A new KBA has been published to help answer some common questions about closing projects and tasks. Read the Best Practices for Closing General Projects KBA here.

Oracle Workflow Notification Updates Coming 08/29/2022
Over the past several months we have been working on updating the Oracle Workflow Notifications with more detailed information to allow you to take advantage of the ability to approve your transactions via email. You can review the details of the following notifications being updated on Blink in preparation for the **release date of August 29, 2022**:

- Accounts Payable Invoices and Invoice Holds
- Contract Invoices
- Journals
- Requisitions, Purchase Orders, and Change Orders
- Project Budgets (Financial Plans)

Due to limited functionality, the following notifications cannot be updated at this time:

- Contracts
- FYI Requisition Approved
- FYI Purchase Order Implemented
- Project Cost Adjustment

Airfare Quarterly Report: April - June, 2022
Travelers who booked their airfare the Triton way with Concur, Balboa Travel, or Kahala saved an average of $134 per ticket in addition to $227,353 in added contract savings! Didn't book in Concur or with a partner agency? Be sure to book appropriately for your next trip so you don't miss out on the full benefit of what our managed travel program offers. Travelers who booked their airfare the Triton way during the spring quarter were automatically entered into an opportunity drawing to win a $25 Visa Gift Card. Congratulations to this quarter's winner, Professor Izzo from Political Science!

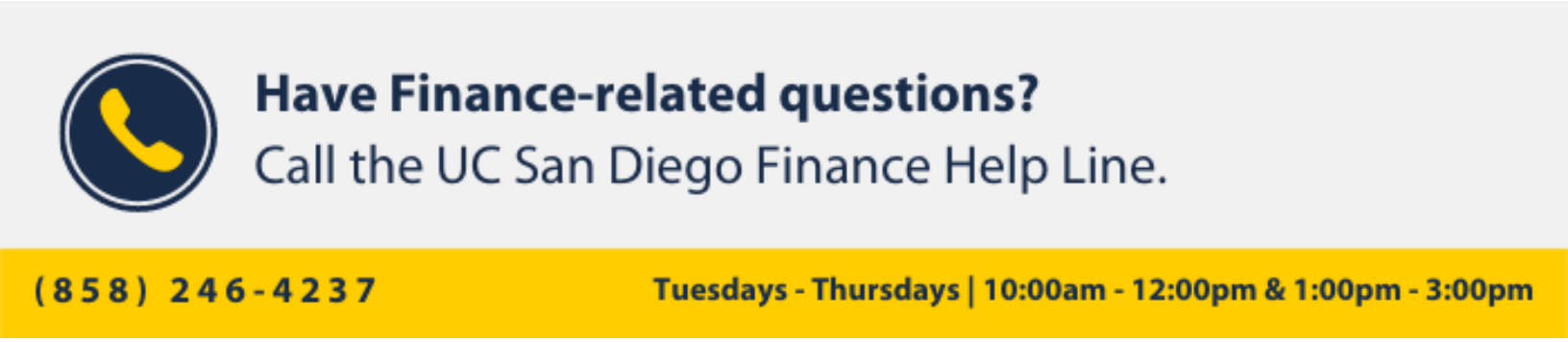
New Report Releases on Department Exceptions Panorama
New Exception Reports have been released on the Department Exceptions Panorama to help you identify issues in Oracle requiring correction. See the BI & Financial Reporting section **below** and Blink for more information.

Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel.

Internal Controls Office Hours
Every Monday
11:00am - 12:00pm
Join the Internal Controls Office Hours to ask questions regarding the internal controls guidance posted on the Best Practices

in Internal Controls Blink page.

Fund Management Office Hours
Every Thursday
11:00am - 12:00pm
At this week's office hours, we will discuss transactions in the General Ledger without a project segment, including which types of transactions typically require correction and which do not. To help you identify transactions needing correction, a new exceptions report has been released on the Department Exceptions Panorama, called Transactions on No Project. That report will be demoed at this office hours. There will also be time for open Q&A.



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!

New Report Releases in the Department Exceptions Panorama

- **Non-Sponsored Contract Lines Without Project or Task** and **Non-Sponsored Contracts Without Revenue Account or Fund**: Individuals who are responsible for creating or managing non-sponsored contracts should use these two reports to identify setup errors on their contracts. If contracts are missing any of these chartstring elements, transactions associated with the contract will not post correctly.
- **Non-Sponsored Generate Invoice Process Errors**: Errors can sometimes occur in Oracle that prevent invoices from posting correctly. Use this report to identify invoices that have failed to post in Oracle and require corrective action.
- **Transactions on No Project:** A new report on the Department Exceptions Panorama identifies UCPath, Concur, or Oracle transactions that were recorded without a project in the General Ledger. This report can be used to identify transactions that belong on a project so they can be corrected.

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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