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Budget & Finance Weekly Digest

February 22, 2022

59th Edition

Announcements

Oracle Reporting Technology Upgrade
In March, Oracle will be upgrading some of its reporting technology to improve performance. Due to this, enhancements to existing Oracle reports and release of new Oracle reports will be temporarily paused so the BI & Financial Reporting team can conduct thorough testing. This will not impact the launch of the Faculty & Researcher Dashboard, nor will it impact the accuracy of the data in existing panoramas or reports. More information and updates coming soon.

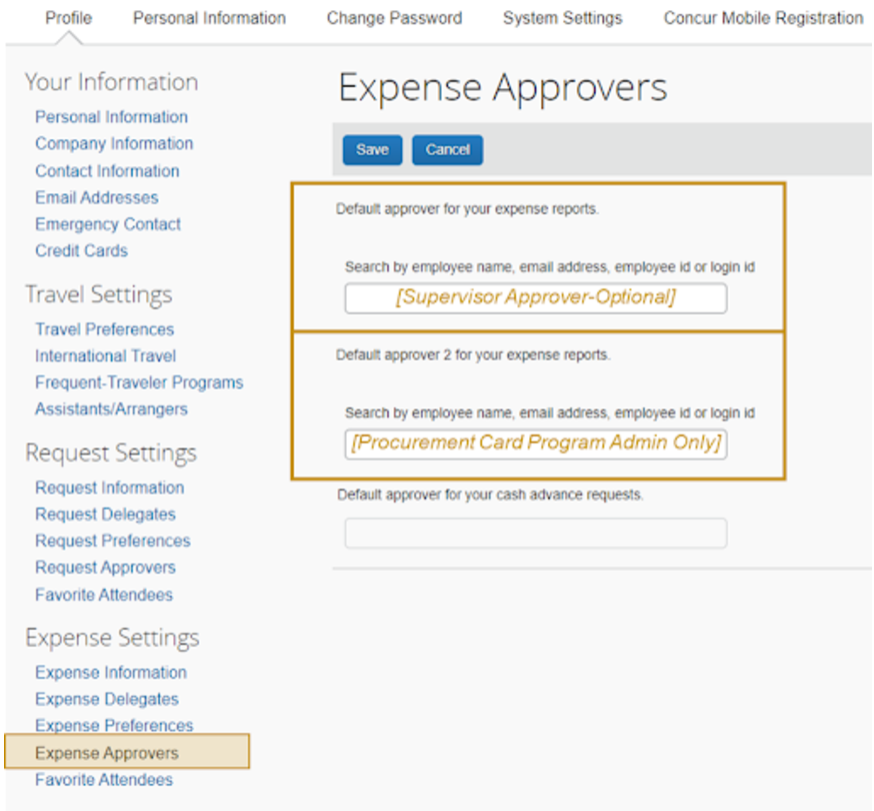
Concur Profile: Default Approvers (Read-Only)
All Default Approver fields under the Concur user's Profile Settings (*Request/Expense Approvers*) will be switched to Read-Only for consistency purposes and to prevent future errors.

- The first **Default approver** field is reserved for departments who request or require Supervisor Approval to be added to the standard approval workflow of every Request/Expense Report.
- The **Default approver 2** field is designated for the IPPS Procurement Card Team's use only. The Procurement Card Program Administrator enters the name of the cardholder's

authorized Department Administrator in this field; no other user should be editing this field.

If you have a Supervisor Approver listed in your Profile, the approver will remain in the field and will not be affected by this change. If you need to update, remove or add your Supervisor Approver per your department's policy, please submit your request to IPPS via Services & Support (*More Specifically: *Procurement Card,* or *Concur Navigation* for all other policies).

Note that approvers also have the ability to edit a Concur document's workflow and add additional approvers if it is not required for the Supervisor Approver to review every Request/Expense Report. Review this Knowledge Base Article (KBA) for more information.



Financial Accounting Program Application is Open!

The Financial Accounting Program application **opened last Friday, February 18** and **will be live through Friday, March 4**. The program is intended to provide fundamental accounting knowledge that can broadly be applied to the financial work done at UCSD. However, the courses do not cover UCSD-specific systems training like Oracle. If you are interested in systems training, we have a library of training videos in the Training Course Blink page.

Currently, we are looking for applicants to start in the upcoming Spring Quarter or Summer Quarter.

For those interested, please be aware that you will need to obtain your supervisor's endorsement to complete your application. If you would like to look at the form, please view it in the Application Process section of the program Blink page.

For those who already applied and have yet to start the program, you should have received an email on February 7 inquiring about your interest. If you did not receive an email and you applied during Fall 2021 or Winter 2021 and desired a Spring Quarter start, please contact financesupport@ucsd.edu.

Additional Spring Quarter Details:

- Acceptance into the program to start Spring Quarter will be announced on March 14.
- Spring Quarter Courses will begin the week of March 28 and conclude June 10.

If you have any questions about the course structure (synchronous/asynchronous) or the time needed to participate in the course, refer to the program Blink page FAQ section.

You can access the application link here. Thank you for your interest in the Financial Accounting Program!

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

UC San Diego Travel: Before You Go

Thursday, February 24, 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 you also attend the *UC San Diego Travel: Reporting Expenses* course before your trip concludes.

Campus Budget Office: Office Hours

Thursdays, 10:00am - 11:00am

Starting February 3 until March 31, the Campus Budget Office will be hosting Office Hours to support budget preparers throughout the planning process. This week's Office Hours will have an open Q&A.

Fund Management Office Hours

Thursdays, 11:00am - 12:00pm

This week we will have open Q&A. Bring your questions and struggles. Nothing a fund manager does is off the table. Trying to figure out the source of a GL-PPM discrepancy? Can't figure out how to get your direct retro with cap gap to work? See a wire you need to claim but have no idea what to do next? Bring your issue to office hours and phone a friend.

UC San Diego Travel: Reporting Expenses

Thursday, February 24, 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 reporting travel expenses on a Travel Expense Report.

University Procurement Card Program

Thursday, February 24, 2022 @ 1:30pm - 4:00pm

Current and prospective cardholders will learn about updates to the card program, common uses, and the Concur processes for both Procurement Card request and transaction reconciliation.

Note that this course is held quarterly and is not an introductory course. Participants must first complete the associated eCourse available through the UC Learning Center.

Accounts Receivable, Cash, & PPM Office Hours

Friday, February 25, 2022 @ 8:30am - 9:30am

This week, we will have an open Q&A session. Bring your questions, comments and your experiences to share with your colleagues across the Campus, we are looking forward to seeing you this Friday.

Oracle: Buying and Paying for PO Requisitioners

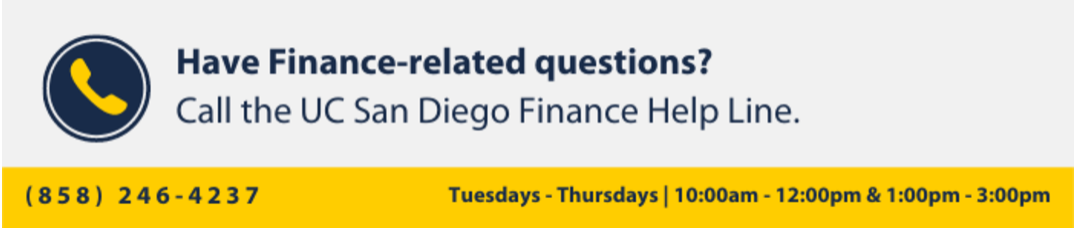
Thursday, March 3, 2022 @ 9:00am - 11:00am

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, closing POs, processing nonPO payments, and checking invoice status. This course will be especially valuable for individuals responsible for departmental purchases who want to further their understanding of buying on campus.

Q&A with UC San Diego IPPS Travel Team

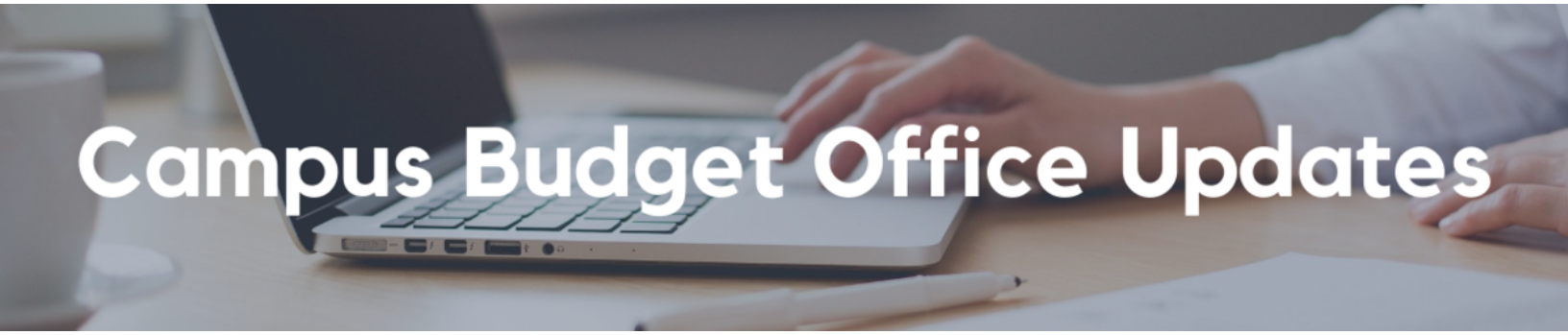
Wednesday, March 23, 2022 @ 11:00am - 12:00pm

Join the UCSD IPPS Travel Team and UCOP's Central Travel Office for a Q&A webinar on booking travel in Concur. Bring your questions and find out more about our complete managed travel program.



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!



Reminder: EPBCS Training Resources

CBO has updated the Frequently Asked Questions Knowledge Base Articles (KBAs) to add answers to some common questions addressed in recent EPBCS budget training sessions and office hours including:

- Current links to Production and Training environments for both Web and SmartView
- How to add a new project #
- How to change the Position Budget Type

- Reasons why an individual may be missing from your roster
- ...and more!

Additional FAQs will be added periodically!

- **FAQ: Compensation Planning in Oracle Planning and Budgeting for Staff and Faculty**
- **FAQ: Preparing a Budget in Oracle Planning and Budgeting**

Links to additional KBAs are also available in the User Guide.

Concur Request and Expense Report Accounting
Review the Concur Accounting Blink pages to learn how Concur Requests and Expense Reports interact with Oracle Financials Cloud with regards to accounting and validation.

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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UC San Diego

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