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Budget & Finance Weekly Digest

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Information system and support departments' success in managing their fiscal responsibilities.

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial system.

- Information system and support departments must ensure that their fiscal requirements are met. This includes regular training, tools, and communications to maximize the system's effectiveness.

- Approved Training Options: Concur Training can be accessed through the UC San Diego Training website. Participants can enroll in the course and log in to the Concur system to process their own reimbursements.

- Additional Resources: The Finance Training website provides various training resources, including videos and presentations, to help users become proficient in the system.

Getting Ready for Fiscal Close
This week, we’ll work with a new line in the daily Digest: a topic focused on Fiscal Close.

- Reporting: Non-employees and sponsors must ensure that their transactions are updated in Payment Compass before the end of the fiscal year. Delays in reimbursement can cause financial issues for the university and sponsored affiliates.

- Concur Access: Who Can Access Concur?
- UC San Diego employees can access Concur through the UC Path, while sponsored affiliates can process their own reimbursements via Concur. UC San Diego needs to be the one to log in and process any PO invoices.

- Additional Resources: Concur Training and other resources are available to help users become proficient in the system.

Oracle Finance Cloud
Oracle Finance Cloud is a cloud-based solution that helps organizations manage financial transactions. It provides tools for budgeting, planning, and cost management.

- Automatic Calculations: Concur Travel & Expense automatically calculates per diem rates for meals and lodging.

- Per Diem Meals and Lodging: Follow this link for more information on how to use the tool.

- Only Certain Projects: This tool is only available for specific projects, so please check with your fiscal officer for guidance.

- Additional Resources: The Finance Training website provides various training resources, including videos and presentations, to help users become proficient in the system.

Oracle Procurement
Oracle Procurement is a cloud-based solution that helps organizations manage procurement transactions. It provides tools for budgeting, planning, and cost management.

- Related To: Concur Expense Type
- This option is available for selection when submitting a Procurement Card Expense Report in Concur.

- Additional Resources: The Finance Training website provides various training resources, including videos and presentations, to help users become proficient in the system.