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Budget & Finance Weekly Digest

March 1, 2022

60th Edition

Announcements

Annual PCI Validation Cycle

For the next two weeks, the Merchant Services team will be working with campus merchants and our PCI QSA/Auditor to complete the annual PCI validation process. This is a courtesy notice that we will not be setting up any new credit card merchant accounts until the completion of the audit cycle, but you may still submit a new application in the meantime by contacting merchantservices@ucsd.edu. Prospective merchants can expect account setups to resume back to normal in April. We appreciate your patience at this time.

Financial Accounting Program Application Period Closing

A reminder, Financial Accounting Program application is closing **this Friday, March 4** at the end of the work day. If you are interested in applying, please use this link. If you would like to know more about the program, please review the Financial Accounting Program Blink page.

Oracle Reporting Technology Upgrade

This month, 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. Updates will be provided in the Weekly Digest throughout the upgrade process.

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

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.

Campus Budget Office: Office Hours

Thursdays, 10:00am - 11:00am

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

In this week's office hours, Heather Sears will give a demo and answer questions about the upcoming Faculty & Researcher dashboard release. The new dashboard brings in payroll projections, project/task health analytics, and improved performance over the current dashboard.

Equipment Asset Management Office Hours

Tuesday, March 8, 2022 @ 8:30am - 9:30am

Starting biweekly on March 8, the Equipment Asset Management team will have open office hours to answer your questions regarding equipment life cycle management, how to navigate CAMS, disposals vs. transfers, and more. We want to hear your questions, and have you share with your peers how your department manages inventorial equipment.

UC San Diego Travel: Before You Go

Thursday, March 10, 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.

UC San Diego Travel: Reporting Expenses

Thursday, March 10, 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.

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.

Concur: Event and Expense Reimbursements

Tuesday, March 29, 2022 @ 9:00am - 11:00am

This live course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. Intended for preparers, hosts/payees, and financial managers who are familiar with policy and would like to learn about the expense reconciliation process in Concur.

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

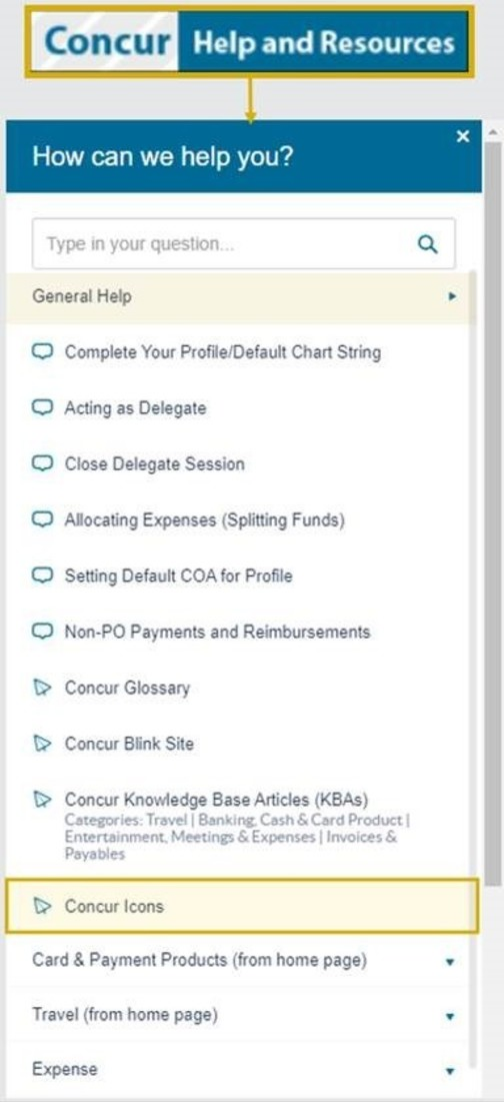
(858) 246-4237 **Tuesdays - Thursdays | 10:00am - 12:00pm & 1:00pm - 3:00pm**

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!

Upcoming Report Release: Faculty & Researcher Dashboard
On Tuesday, March 15, the Business Intelligence and Financial Reporting team will launch an enhanced Faculty and Researcher Dashboard in the Business Analytics Hub. The dashboard's performance has been improved and will include payroll projections and projection details. More information coming soon including dedicated support options. See a demo of the report at this week's Fund Management Office Hours.

Curious What Each Icon in Concur Represents?
Take a look at SAP Concur's list of various icons, their descriptions, and in which module they can be found in Concur (Expense, Request, Travel). You can get to the list of Concur icons from our KBA or from the **Concur Help and Resources** WalkMe menu (as shown in the image below).



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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