

Budget & Finance Weekly Digest

September 26th, 2023 | 140th Edition

Announcements



New Fabrication Structure and Request Process LIVE in PADUA!

In support of the new Fixed Assets module, the new fabrication structure and request process is now available in PADUA.

What you need to know

- **The new structure is shifting to a new project with a specific Fabrication Project Type, as opposed to new tasks.** The following project types have been added/updated:
 - UCSD Fabrication General Project - Fabrications for non sponsored projects
 - UCSD Fabrication Sponsored Project - Fabrications for sponsored projects
 - UCSD Sponsored Project - Non fabrication sponsored projects
 - DNU UCSD Sponsor Project - Sponsored projects created prior to 09/21/2023 (previously UCSD Sponsor Project)
- **You will NOT need to create 1 project for each fabrication.** If you have a need for multiple fabrications, all that is needed will be one specific Fabrication Project, and within that project additional task(s) can be created for each fabrication.
- **You will NOT need to convert existing fabrication tasks to the new project structure.** If you already have fabrication tasks that are still in progress, you can continue to use the existing POETAF combinations that exist for them today. This new structure will only apply to NEW awards or NEW fabrications created beginning 09/25/2023

Please join us at **10:05 AM** on [Zoom](#) during the following additional Office Hours to learn more about this structure, how to request a new fabrication project through PADUA, and a reminder on which expenditure types/account codes to use for fabrications:

- **Monday October 2, 2023**
- **Monday October 16, 2023**

Sponsored Projects Report Errors Due to Project Type Changes

Changes were made in Oracle to the values for Project Type for sponsored projects. Many reports use this value either to filter for sponsored projects or derive logic specific to sponsored projects. The BI & Financial Reporting Team has been investigating and resolving impacted reports, but if you run a report and either sponsored projects are missing data or they appear where they should not, please [submit a Services & Support ticket](#) with the report name and a screenshot of what you're seeing (or not seeing).

Seeking Input on Oracle Training Development

Business & Financial Services is excited to announce the launch of an [IdeaWave campaign to gather your feedback on an upcoming Finance Training Program](#). We're looking for Oracle users of all levels of experience to share their ideas on which topics this self-paced training should cover. We welcome you to participate prior to the launch of this course. Your involvement will help us create a comprehensive learning experience and also empower you to influence the specific topics you'd like to further explore in the training. Review the graphic below for more information. Submissions will close on October 19th.

How you can help:

- 1** Review the potential list of training topics
Take note of what you feel is missing or needs elaboration.
- 2** Share topic suggestions on IdeaWave
All ideas are welcomed -- they might be the missing piece someone else was looking for!
- 3** Upvote your favorite submissions
Vote on the ideas that you think belong in the training.
- 4** Comment on posts to boost engagement
Discuss and build on each other's ideas!

Click here to view the list of Oracle training topics!

START

The campaign closes October 19th!

Resolved: Access to Cognos Reports

Earlier this month when someone was granted the Oracle BI Consumer JR role, they were not being given access to Cognos reports as well. This has been corrected and anyone that received the role this month, and moving forward, should have access to both Oracle and Cognos reporting.

Small Business Development Office - Vendor Capability Business List

The Small Business Development Office (SBDO) team connected with a wide range of small, diverse vendors, suppliers, and procurement professionals during the *Caltrans District Annual Procurement & Resource Fair* (08/30/23) and compiled a list of vendors who expressed a strong interest in doing business with the University and Health System. View SBDO's [Vendor Capability Business List](#) for vendor details and contact information. To learn more about small business initiatives and how you can support small, diverse businesses at UC San Diego, check out [SBDO](#) on Blink.



Watch recorded office hours and more on our [UC San Diego Budget & Finance YouTube channel](#).

[Travel Program Webinars](#)

Join us to learn about the benefits of booking travel within our system-wide travel program! Hear from supplier partners and industry experts during these engaging sessions. You may even win a prize! Use this link for the schedule, session descriptions, and registration information.

[Travel Webinars | Connexus \(ucop.edu\)](#)

[ECERT Effort Reporting Office Hours](#)

Every Wednesday @ 2:30pm - 3:30pm

Come get your questions answered, system access setups, or helpful hints on the effort report certification process.

[Fund Management Office Hours](#)

Every Thursday @ 11:00am - 12:00pm

Come get your questions answered and solidify your knowledge and understanding from a useful and information packed session. Don't miss it!

[Internal Controls & Accounting Office Hours](#)

Last Wednesday of the month @ 1:00pm - 2:00pm

Join our Internal Controls & Accounting team for office hours the last Wednesday of each month as a platform for discussion related to General Ledger related transactions, Intercampus Recharges, and Payroll reconciliation. ICA team will provide any updates available and the session will be open for Q&A.

[UC San Diego Travel: Before You Go](#)

Thursday, September 28 @ 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, September 28 @ 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

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).

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!



Planning to attend a conference or business meeting where expenses are bundled or “All-Inclusive”?

When it comes to attending a conference where expenses such as registration fees, lodging and/or meals are bundled (e.g. Gordon Research Conference), it is crucial to understand the breakdown of fees to ensure that you stay within the UC maximum for lodging and meals at your conference's specific location. To do this, remember to reach out to the conference organizers to request a detailed breakdown. To streamline your reimbursement process and avoid potential delays, consider requesting the fee breakdown either before, during, or after your trip by emailing the conference organizers. Typically, the conference organizers can provide this breakdown by email within 24-48 hours.

The requirement for a breakdown of fees applies whenever lodging or meals are consolidated with other expenses, without presenting a detailed breakdown for each individual cost. So for any all-inclusive or bundle deals, ensure you are requesting a detailed itemization from the vendor and attaching it to your expense report prior to submitting.

Things to Remember When Submitting a Travel Expense Report

Does your travel expense report always get returned? Does a Central Office auditor always reach out to you requesting additional information about your trip? The Central Office created this [checklist](#) with helpful reminders on what is required in a Travel Expense Report. We recommend that you download the checklist and/or bookmark it in your browser of choice so that you keep it handy when creating and submitting travel expense reports. For more information on which receipts are required when submitting a travel expense report, check out the [Travel Receipts: Reimbursement Requirements](#) Blink Page.

The Support Framework: Your Guide to Finding Help

Learning all there is to know about budget & finance can feel daunting.

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.

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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](#)

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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 support ticket in Services & Support](#)

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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 finance.support@ucsd.edu
- Submit a ticket to [Budget & Finance Support](#)
- Find the form in our [Request Catalog](#) to process your transaction request

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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
- Create & Cancel financial reporting enhancement

Resources:

- [Budget & Finance Suggestion Box](#)
- [Business Analytics Data Help Page](#)

View the full Support Framework on Blink.

UC San Diego

BUDGET & FINANCE SUPPORT



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

(8 5 8) 2 4 6 - 4 2 3 7

Tuesdays - Thursdays | 10:00am - 12:00pm & 1:00pm - 3:00pm

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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