Budget & Finance Weekly Digest

August 9, 2022 | 83rd Edition

Announcements

Financial Accounting Program Returns Fall 2022!
This past year, the Financial Accounting Program has supported staff with various roles and responsibilities to establish foundational accounting knowledge across UC San Diego.

Attend an **Information Session** to learn more about the program and upcoming enrollment deadlines. Please register for one of the following dates.

- Tuesday, August 16, at 10am
- Thursday, August 18 at 2:30pm

For more information, please visit the Financial Accounting Program webpage.

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 Adjustments

We Want Your Feedback!

We welcome you to complete a quick survey on how the Fiscal Close Bulletin went for you. The survey will close this **Friday, August 12**.

Complete the Survey

Concur Messaging - Travel Expense Report Review Status

Have you noticed the "Login Warning" pop-up window when you first login to Concur? Instead of clicking OK to make the message go away, take a moment to read through the updates included in that window. The latest information that we have included, in an effort to raise awareness and manage expectations, is the status of Travel expense reports arriving in the Central Office workflow.

To avoid out-of-pocket expenses and a delay in receiving reimbursements, use one of the university's purchasing/payment channels such as Procurement Card, Travel & Entertainment card, Booking Travel through Concur, Amazon Business and Oracle Procurement. Reference our Procure-to-Pay Decision Matrix, the Travel & Entertainment Card and the Booking Travel web pages 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 project classifications: what they are, how they are structured, how to view them, and why they will matter in the months ahead.

Oracle: Buying and Paying for Financial Unit Approvers

Thursday, August 11, 2022
9:00am - 11:00am
This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as reviewing for and populating POETAF information during the ordering process, approving requisitions and invoices, revising orders, and checking PO invoice status. This course will be especially valuable for individuals responsible for those responsible for approving requisitions and invoices on behalf of their financial unit.

Please note the Introduction to Oracle Procurement & Payables eCourse is a required prerequisite for registration.

Camp IPPS Open House
Monday, August 15, 2022
9:00am - 11:00am
Join IPPS for a bit of camp-themed fun before starting the 'in-tents' training week ahead.

- Meet your Camp Counselors (course instructors/presenters)
- Camp-themed photo booth and snack station
- Opportunity Drawings
- Giveaways
- and more...

Register for Camp IPPS Open House and check in at the event for a chance to win a prize!

Camp IPPS
August 15-19, 2022
There's more to Camp IPPS than 'in-tents' Oracle and Concur training. Register for these courses to discover something new about IPPS and expand your horizons.

- Competitive Bids at UC San Diego
- Navigating the Logistics Portal
- Small Business Programs & Policy
- Sustainable Program & Policy
- The World of Surplus Transfer Requests
- Thermo Fisher Scientific and UC San Diego

Log in to UC Learning with your SSO and click on the links above to take you directly to the course details and registration.

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!

Enhancement: Project Information Lookup
The following enhancements have been made to the Project Information Lookup Panorama:

- A Report List has been added as the first page of the panorama.
- Prompts for Fund and L4 Financial Unit have been added to the Project COA Lookup report.
- A prompt for Project Owning Organization has been added to the Non-Sponsored Project Task DFFs report.
- The Project Overview Report has been rebuilt in Cognos (linked from the Report List page) and the following fields have been added to the report:
    1. Project Creation Date
    2. Project Class Category and Project Class Code*
    3. Effective Burden Schedule, Effective Burden Schedule Multiplier, and Effective Burden Schedule Level.
        1. If there are Project or Task Burden Schedule overrides in place, the report will display the lowest level Burden Schedule applicable to the Award/Project/Task.
        2. The Effective Burden Schedule Level displays which level (Award/Project/Task) the Effective Burden Schedule comes from. For example, if the Task has a Task Burden Schedule override in place, the Effective Burden Schedule Level column will display 'Task'.
        3. For more information on Burden Schedule overrides, see Understanding Burden Schedules.

Thank you to everyone who submitted these enhancement requests, including: Lindsay Root, Marissa Prough, Ariel Tam, Bryahna Keels, Chay Mendoza, Hanna Choe, Michelle Tellez, & Chester Yao.

*Note: Associating accurate Project Class Categories and Codes will become increasingly important as future report developments will allow you to search for and display information about projects based on their classifications. The Project Overview Report can be used to review how projects are classified (see chapter 2 of the PPM User Guide) and PADUA can be used to update Project Classifications. We encourage you to start reviewing Project Class Categories and Codes.

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.

Visit Our Website | Subscribe to our YouTube | Contact Us

UC San Diego

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