Budget & Finance Weekly Digest



September 19th, 2023 | 139th Edition

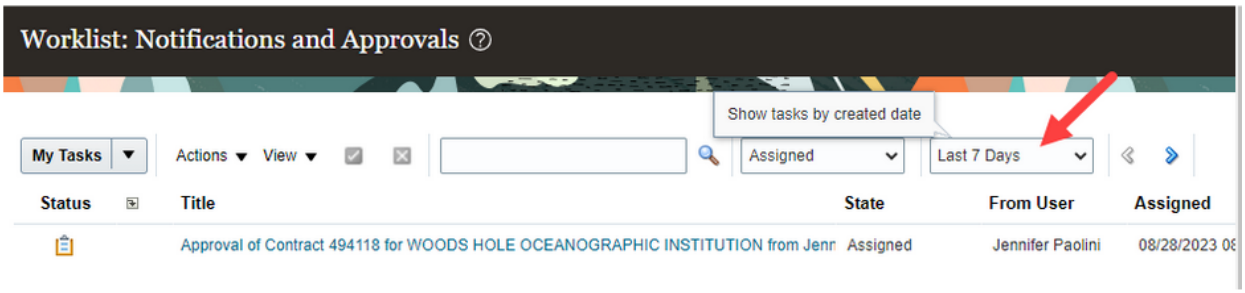
Announcements



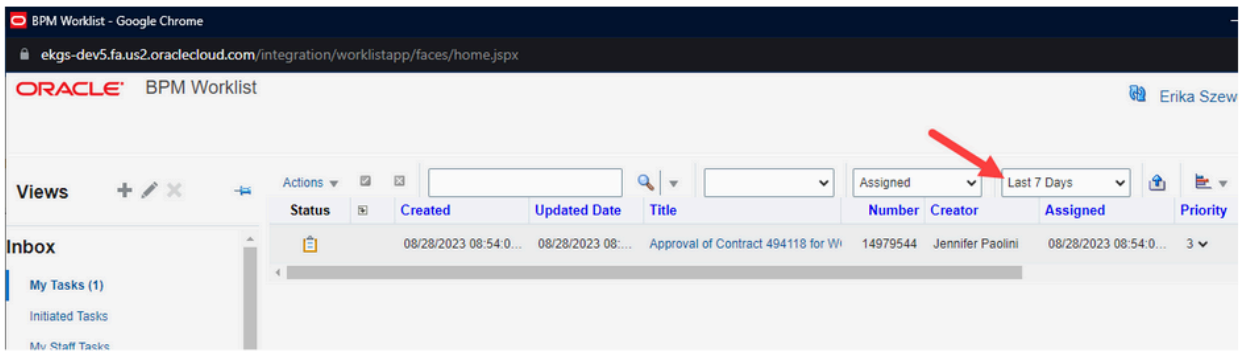
Updated Oracle ADF Desktop Integration Add-In Available on 9/18/2023
When using one of Oracle's excel spreadsheet templates, you will be prompted to download the latest version of the Oracle ADF Desktop Integration add-in, version 5.1.3.25923.

New Task Filter on Oracle Worklists Available on 9/18/20
Within the following two areas, a new date filter has been added based on the transaction's creation date. This filter will only apply to the **My Tasks** view, and **automatically defaults to the last 7 days.**

Tools > Worklist > My Tasks



BPM Worklist



Oracle Fixed Assets Module Inquiry Access Granted
As we wrap up the conversion of existing active assets this week, all active Oracle users have been granted the UCSD FA Inquiry and Reporting JR role in Oracle production. This role will allow users to view financial and descriptive details associated with their assets in the new Fixed Assets (FA) module.

To help you get started, we invite you to watch a brief three-minute video. This video will guide you through the navigation of the FA module and how to search for your assets!

To learn more about the Fixed Assets module and details about the implementation project, we encourage you to visit the following Blink Pages:

- Oracle Fixed Assets
- Fixed Assets Implementation

Reminder - Source Selection and Price Reasonableness Form
The Source Selection and Price Reasonableness (SSPR) form is required for purchases using federal funds that are equal to or greater than $10,000 and/or purchases using non-federal funds that are equal to or greater than $100,000. This form was designed and instituted by UCOP to help ensure that the university's purchases and supporting documentation are in compliance with all applicable federal, State and/or UC regulations, and that the University's purchases are appropriately documented for audit purposes, especially in regards to competition.

To aid in completing the SSPR form correctly, UCOP has also provided SSPR Form Completion Instructions, which contains definitions, examples and resources. Links to both of these documents can be found within each of the various Oracle request forms.



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 | Connexxus (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!

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.

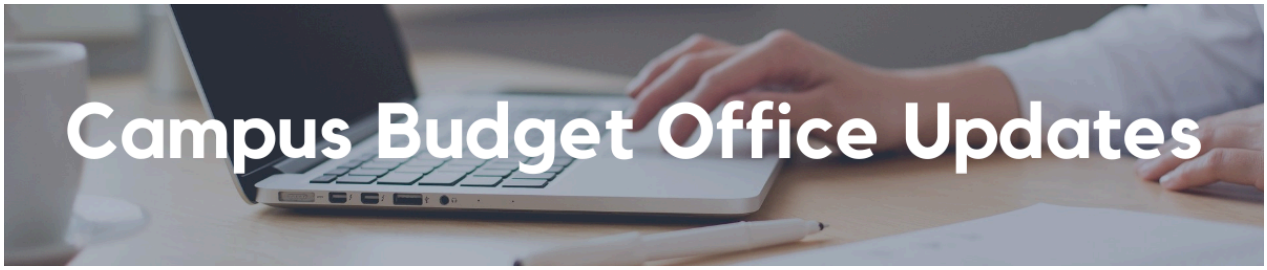
Topics Covered:

- 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!



New CBO Course Available on UCLC: An Introduction to Budgeting and Financial Concepts at UC San Diego

This introductory course was developed by CBO with input and collaboration from university partners. It provides an overview of financial and budgetary concepts and systems at UCSD with a focus on the General Ledger and Core Funds. It is intended to be useful for any UCSD staff who perform a financial function in their team or department, not just those who develop budgets, with the goal of establishing a shared financial language that will enable us to work together more effectively in service of the University's mission.

You can access the course at https://go.ucsd.edu/46gJEst

If you have any questions or feedback about the course, please reach out to Kathryn Friedberg, CBO's Campus Training and Development Specialist.



Entertainment Expenses – Tips and Tricks

With the 2023-24 academic year just around the corner, here are some resources that will help with planning successful events:

- The Meetings & Entertainment Blink page provides an overview of University of California Entertainment Policy BUS-79
- This Blink page has a breakdown of our different Event types/business purposes and their descriptions
- For more information on meal maximums, check out the Meetings and Entertainment: Maximum Meal Expenses Blink page
- This checklist is a helpful tool to ensure that you provide all the required information

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.



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**

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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