

December 6, 2022 | 100th Edition

Celebrating the 100th Edition of the Budget & Finance Weekly Digest

It has been our pleasure to deliver timely information that matters to YOU, our campus community, for 100 weeks.

Thank you to all who have contributed! We could not have reached this milestone without the collective efforts of our contributors from across the Business & Financial Services (BFS) divisions and our campus partners.

We also want to thank Bea Florentino, who was the primary curator and publisher of the weekly digest. Thank you, Bea, for ensuring the digest was delivered on time every week. We appreciate all that you have done for BFS and the campus community. We wish you the best of luck in your future endeavors!



Balboa Service Fee Update

Balboa's new fee structure is live! All fees, regardless of type of purchase, will show up in Concur as an Airfare Expense Type. Fees are valid for purchasing airfare, hotel or rental cars either in Concur or with Balboa directly. This can be misleading since it looks like an Airfare purchase when it was actually for a hotel or rental car booking. We are looking for ways to improve the display to make it easier for all users.

Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ↑↓	Amount
*UCSD - CTS Air, Hotel Card	Airfare	AGENT FEE 8900842051322	11/23/2022	$3.00
*UCSD - CTS Air, Hotel Card	Airfare	AGENT FEE 8900842051321	11/23/2022	$3.00
*UCSD - CTS Air, Hotel Card	Airfare	AGENT FEE 8900841766017	11/16/2022	$3.00
*UCSD - CTS Air, Hotel Card	Airfare	AGENT FEE 8900841658982	11/13/2022	$3.00

New Common Chart of Accounts Display Order in UCPath

Beginning in two weeks on **December 12**, UCPath is implementing a New Common Chart of Accounts (CCoA) Display Order. This project will update UCPath chartfield ordering adhering to the new UC systemwide standard.

Who will be impacted?

- The new CCoA Display Order will only impact UCPath users.
- OFC users will not be impacted. There will be no change to data entry in OFC.

Resources:

- New CCoA Display Order Micro Learning Video
- Current UCPath Order vs. New UCPath Order Diagram
- UCPath New CCoA Chartfield Definitions Diagram

For a complete description of this project along with the list of UCPath pages impacted by this change, please refer to UCPath's New CCoA Display Order Project Space.



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

Fund Management Office Hours
Every Thursday @ 11:00am - 12:00pm
At this week's office hours, we will cover a variety of **PPM Topics including Commitments, Cost Transfers, and Recharges.** Come and get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

Travel for Students on Study Abroad Programs
Wednesday, December 7, 2022
11:00am
UC's contract with Student Universe provides a variety of benefits to our students and we will highlight those along with the exciting Airfare Deposit Program.

Oracle: Buying and Paying for Financial Unit Approvers
Thursday, December 8, 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.

Reporting Workshop: Dashboard of the Week Series

Monday, December 12, 2022

11:00am - 12:00pm

Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include an interactive report demo, discussion of what questions the report can answer, opportunities to ask questions and walk through your use cases, and hear how others are using the dashboard or report. Next week's session will feature the **Default Project Payroll: Advanced Topics**. This will be our last session of the year and the series will resume in January 2023!

See here our updated schedule of our session topics for 2023.

Oracle: Buying and Paying for PO Requisitioners

Thursday, December 15, 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.

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



New Enhancement Release: Project Cost Transfer Dashboard

1. Transfers by Status

a. Users are now able to view cost transfers by their adjustment status, review rejected cost transfer requests and the reason for rejection, and view where a cost was posted to and where it has been transferred to.



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.

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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