Budget & Finance Weekly Digest



February 6th, 2024 | 157th Edition

Announcements

Financial Accounting Program: Upcoming Information Sessions
The UC San Diego Financial Accounting Program is a complementary professional development opportunity being offered to help you become more effective in your role. This program is currently offered at no cost to eligible career employees through the end of the fiscal year (Spring 2024)!

We invite you to hear more by attending an upcoming Information Session for the following dates. Please register using links below:

- Tuesday, February 27, 2024 @ 10:00am - 11:00am
- Thursday, February 29, 2024 @ 1:00pm - 2:00pm

You are encouraged to share this information with your teams, colleagues, and those who may be interested in participating in the full program or Financial Accounting for Non-Accountants (FAFNA) as a standalone course.

We appreciate the partnership with UC San Diego Division of Extended Studies and the support from supervisors across campus and health sciences.

Get Familiar with Oracle Guided Learning! (Coming February 2024)
In case you haven't heard, Oracle Guided Learning is launching February 2024. We are elevating our training and guidance resources to provide users with a more streamlined support system. As part of this transition, we are identifying and converting traditional knowledge base 'how-to' articles into the new On-Guide Learning (OGL) format. Eventually, these articles will be phased out from the Services & Support Knowledge Base. Users will be seamlessly redirected to the new, enhanced method of interacting with the system, ensuring a more efficient and user-friendly experience. Stay up to date with all the latest news, announcements, and crucial points surrounding the OGL by accessing our engaging and informative Blink page. Explore various aspects of the OGL and stay in the know with ease.

Procurement Cardholders - Create a User Profile in US Bank's Access Online Portal & Sign Up For Real-Time Fraud Alerts

If you are a Procurement Cardholder you can create a profile in Access Online in order to review your Procurement card profile, including contact information and limit information. You can also sign up to receive real-time fraud alerts, if US Bank ever identifies any transactions on your Procurement Card as suspicious. It's quick, and it's easy!

- Simply navigate to Access Online
- Click on "Register Online"
- Enter UCSD as the Organization Short Name, followed by your 16-digit card number and expiration date.
- Click "Send a Code" and an email will be sent to the UCSD email address on file with your Procurement Card, in order to complete the registration process.
  After completing registration, you can sign your account up for real-time fraud alerts by doing the following:
  - To Enroll, go to My Personal Information > Account Alerts > Fraud Alerts
  - Confirm your contact information, select how you would like to receive your alerts (text/email), accept the terms and conditions, and click Submit.

*For more information about US Bank Access Online, please review our **Blink page**.*

Access to Concur
Active employees have direct access to Concur by using their Active Directory (AD) login credentials. In very limited cases, some affiliates may have access.

If an employee in your department was separated in UCPath and rehired, their Concur account may not always automatically re-activate in the current state. We are working with IT Services for a resolution on that issue.

New employees should have access to Concur in approximately a week after the employment start date as employee data flows from UCPath to OFC, then to Concur.

If an employee has trouble accessing Concur, below are some tips:

- The employee should check that their AD credentials are working correctly by testing to see if they can log into other systems such as UCPath and Oracle
- They should check to ensure that they are using Google Chrome and that they have cleared their cache/browsing history and attempt to log in to Concur again. Once they are logged in, make sure they are selecting University of California San Diego, not UC Office of the President.
- They should check with their department HR or Academic Personnel contact that their employee status in UCPath is active
- If all of the above have been verified and they are still having trouble logging into Concur, submit a case via Services & Support, Budget & Finance, select Concur (Access or Role Inquiries) under the More Specifically section of the Get Help online form. We will work with IT Services to reactivate their account. Make sure the following information is included in the support case:
  - A detailed explanation, including a note that the employee is active in UCPath
  - Include the employee's email address and Employee ID number

Graduate Tuition Remission
Academic Year 2023-2024 Graduate Student Tuition and Fee (GSRTF) pooled rates for Graduate Student Researchers (GSRs) rates are now available at:
https://grad.ucsd.edu/financial/employment/student-pay-rates.html

The new GSRTF rates for 2023-2024 will increase by $115.33 per month. Because of the late notice, we will only apply this new rate for Winter and Spring 2024 (January - June).

Tuition remission for October 2023 - January 2024 (including corrections and retroactive changes to payroll made within that time frame) will be posted to the January ledger.

For assistance with tuition remission, please submit a ticket via Services and Support and select **Financial Accounting > Graduate Student Financial Administration > Graduate Tuition & Fee Remission Accounting** or, email gradfinance@ucsd.edu. Please include the EID (Employee ID) and PID (Personal Identification Number - i.e. student ID), as well as any screen shots or financial reports, when submitting a ticket.

Campus Budget Office Updates

The 2024-25 Campus Budget Development Cycle is Underway. Oracle Budget (EPBCS system) is Now Open.

New! Access the EPBCS production environment to complete your FY25 operating budget at https://planning-ekgs.pbcs.us2.oraclecloud.com/HyperionPlanning

Training sessions are still available in-person or for the Smart View options. Register using the links below:

- Oracle Budget: Budgeting Salaries and Benefits for Academic Units - Register Here
- Oracle Budget: Budgeting Salaries and Benefits for Admin Units - Register Here
- Oracle Budget: Non-Compensation Expense Planning - Register Here
- Oracle Budget: Budgeting Salaries & Benefits in Smart View - Register Here
- Oracle Budget: Budgeting Non-Compensation in Smart View - Register Here
- Oracle Budget Data: Smart View Ad Hoc Tips and Tricks - Register Here
- Oracle Budget: Budgeting Capital Projects - Register Here

Join our Community of Practice (COP)
The Budget and Planning COP channel audience includes Budget Preparers identified by each Vice Chancellor Office with responsibility to create Financial Unit budgets within the Oracle Planning and Budgeting system (EPBCS).

Need EPBCS Support? Submit a Ticket to Services and Support
For technical issues or questions about any of the Task Lists, please submit a ticket via Services and Support. Just select **Budget & Planning > Oracle Planning & Budgeting (EPBCS)**.

Tips & Tricks

Reminders for PO Change Orders and statuses
You cannot submit a change order on a Purchase Order (PO) that has a status of **Closed**. If you need to add funds, you should instead create a new PO. If you are trying to edit the billing information, please look into initiating a Cost Transfer.

If you are looking to add funds to a PO *before* the order has been fully invoiced or closed, you can use the Add line to existing PO request form.

Closed for Receiving means that your PO is open. Please refer to the Oracle Glossary for more statuses and their meanings.

Training & Support

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

Concur: Event Expenses & Other Reimbursements
Thursday, February 15, 2024 @ 9:00am - 10:30am
The course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. This course will be especially valuable for employees who host meetings and events and want to further their understanding of the expense reconciliation process via Concur. Also, those who previously utilized MyPayments for requesting employee reimbursements for business expenses may attend this course. Intended for preparers, meeting/event hosts, financial managers, and entertainment approvers who are familiar with Entertainment Policy BUS-79 and would like to learn about more advanced meetings and entertainment terminology and concepts.

Topics Covered:

- Learn how to submit event payment requests and employee reimbursements via Concur
- Review the process to submit event vendor payments
- Be able to view and reconcile Travel & Entertainment card transactions

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UC San Diego Travel: Before You Go
Thursday, February 22, 2024 @ 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, February 22, 2024 @ 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

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 understanding during this information-packed session. Don't miss it!

IPPS Office Hours
IPPS holds **weekly** Office Hours to help with all of your questions related to Procurement, Accounts Payable, Travel and Entertainment, Procurement Card and Tax & Account/Supplier Setup. This is our schedule:

- **Procure-to-Pay, Travel & Entertainment, Tax & Accounting/Supplier Setup**
  Mondays 1-2:00 p.m., Wednesdays and Fridays 9-10:00 a.m.
- **Procurement Card**
  Wednesdays 9-10:00 a.m.

ICA 1:1 Sessions
Sign up for 1:1 zoom session with ICA team members

- ***Payroll Financial Management team*** 1:1 sessions have moved from UCPath to ICA. Register here for help with Salary Cost Transfers, Direct Retros, Payroll Reconciliations, UCPath Funding Transactions, Composite Benefit Rates (CBR), General Liability (GAEL) & Vacation Leave Assessment (VLA).
- ***General Ledger Financial Management team***
  Register here for help with General Ledger, Capital/ Fixed Assets, Detail Code setup, ITFs, Internal Controls, Oracle Role questions and more.

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!

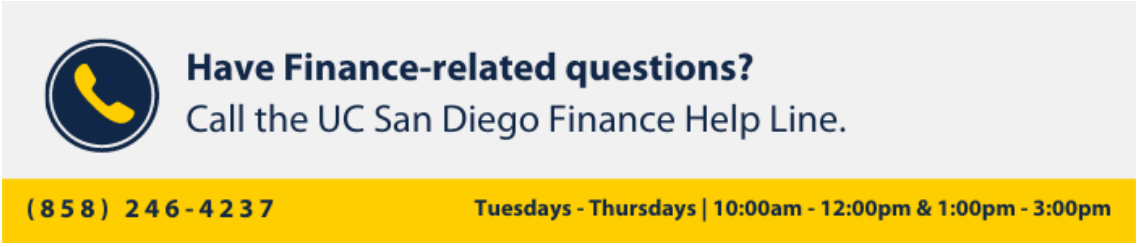
The Support Framework: Your Guide to Finding Help
Learning all there is to know about budget & finance can feel daunting.

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.

Visit Our Website | Subscribe to our YouTube | Contact Us

UC San Diego

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