

# 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](mailto: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

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## **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
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### **[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.

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### **[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!

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### **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.
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### **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.
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### **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).

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*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!*

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# 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.

**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 Guides](#)
- [Accounts Payable Articles](#)
- [Community of Practice](#)
- [Published Information in Black](#)
- [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 Service & Support
  - E.g. "I need you to process my request..."

**Resources:**

- [Attend an Office Hours session](#)
- [Contact the Finance Help Line](#)
- [Submit a request ticket in Service & 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 [finance.support@ucsd.edu](#)
- Submit a ticket to [Budget & Finance Support](#)
- Find the form in our [Support 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
- Create & Cancel financial reporting enhancement

**Resources:**

- [Budget & Finance Supporter Box](#)
- [Business Analytics Hub Help Page](#)

View the full Support Framework on Black | UC San Diego



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

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**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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