Budget & Finance Weekly Digest



January 18, 2022 *54th Edition*

Announcements



Upcoming Report Release: Gift Fund Panorama
The new Gift Fund Panorama, which will be available starting **January 25th** in the Business Analytics Hub, will offer a single dashboard to help Fund Managers evaluate their gift funds. The new panorama will include information such as:

- Campus and Foundation Ledger details and balances
- GL and subledger transaction details
- PPM Module project/task reporting

For a sneak preview, watch a recorded demo on YouTube.

UCPath and WalkMe for Funding Entry!
In an effort to assist Funding Entry Transactors in UCPath, we've adopted WalkMe for use with the Funding Entry page. WalkMe is a Digital Adoption Platform that will support users by providing contextual help and making certain fields required on the Funding Entry page in UCPath. This will help ensure that appropriate chartstrings are being entered correctly. This will reduce subsequent clean-up efforts such as Direct Retros and Cost Transfers when chartstrings are entered incorrectly.

WalkMe is now in UCPath Production. Should you have any questions, please contact walkme@ucsd.edu.



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

Fund Management Office Hours

Thursdays, 11:00am - 12:00pm

This week, representatives from Foundation Accounting will offer training on the **STAR Dashboard**.

STAR Dashboard Training

Thursday, January 20, 2022 @ 11:00am - 12:00pm

Kris Vasquez from the Office of Donor and Fund Stewardship will provide an overview of the STAR Dashboard, explain the types of data you can find within the reports, and provide navigation tips. This is helpful for those who are new to the University or need a quick refresher.

Oracle: Buying and Paying for PO Requisitioners

Thursday, January 20, 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.

Hot Topics: Procure-to-Pay and Travel & Expense Resources

Thursday, January 27, 2022 @ 10:00am - 11:00am

Join the Integrated Procure-to-Pay Solutions (IPPS) Team for the next session of Hot Topics! This is a monthly series dedicated to critical concepts and processes in Oracle Procurement and Concur.

This session, our presenters will review the various resources available for navigating Oracle Procurement & Payables and Concur Travel & Expense,

and how to best interact with them. This is a great Hot Topics to attend if you are new to UC San Diego/your role or would like a refresher on the IPPS resources.

UC San Diego Travel: Before You Go

Thursday, February 10, 2022 @ 9:00am - 11:00am

Faculty and staff who travel or book business travel can further their understanding of preauthorization, booking travel via Concur, prepaying with the Travel & Entertainment Card, and how to take advantage of TripIt Pro. It is recommended that you also attend the *UC San Diego Travel: Reporting Expenses* course before your trip concludes.

UC San Diego Travel: Reporting Expenses

Thursday, February 10, 2022 @ 1:00pm - 3:00pm

This course provides an overview of UC San Diego travel policy and the trip reconciliation procedure, including summarized guidelines and on-demand resources. Faculty and staff will learn about the Concur processes for reporting travel expenses on a Travel Expense Report.

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!



Report Deprecation: Expanded Budget Summary

The Expanded Budget Summary report has been taken offline at this time due to performance and maintenance issues. Users can access the same information via the following reports:

- **Budget vs Actual** from the **Budget and Financial Management Reports Panorama** for summarized level of Budget, Actual and Variances
- **General Ledger Transaction Details** from the **General Ledger Panorama** for ledger detail transactions

Report Development page on Blink
Do you wish you could be more involved in the report development process? Wonder what happened to that enhancement request you submitted? Curious what we're working on now? Find answers to these questions on a new Blink page for Report Development.



Is Your Travel & Entertainment Card Ready for Use?
For future University business travel and events, it is important that you have your Travel & Entertainment (T&E) Card ready for use to avoid card declines and having to pay out of pocket.

For existing cardholders, please ensure that you have received and activated your T&E Card. You should also confirm that you have the correct card by verifying that the rebranded name, **UC San Diego Travel & Entertainment**, is displayed on the upper-left corner of your card. If you previously held a Travel Card and have not received your new T&E Card, please contact IPPS via Services & Support (*Related to: Travel & Entertainment Card) for assistance with getting a replacement card.

T&E Card applicants must submit their New Card Request via Concur. If you need the card mailed to an address different from your mail code, please follow the instructions provided in this KBA and avoid entering Personally Identifiable Information (PII) in Concur. Cardholders can also request necessary card changes via Concur.

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.

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