

# Budget & Finance Weekly Digest

October 3rd, 2023 | 141st Edition

## Announcements



### **Uncleared (Concur) Credit Memos in OFC – New Report!**

A new report has been released in the Business Activity Hub (BAH) that displays outstanding Credit Memos from Oracle Financials Cloud (OFC), created via Concur Expense Reports with a net amount owed by the employee as a result of Personal/Non-Reimbursable Card Charges, Cash Advance Returns or Travel Card Per Diem Offset.

The report is accessible through two panoramas (1) the Department Exceptions Panorama, and (2) the Procure-to-Pay Panorama in the BAH, under Budget & Finance. Filters for employee, invoice number (i.e. Credit Memo number) and Financial Unit are available. Information about this new report is available through [Blink](#).

If this is your first time accessing the [Business Activity Hub](#), use your Single-Sign On to log in or take a look at the [Get Started](#) introduction.

Please join the [Travel & Expense Office Hours](#) or submit a [Services & Support](#) case if you have any questions.

### **Concur User Interface (UI) Updates are now LIVE!**

Starting October 2nd, Concur has implemented a new default User Interface (UI). While this is now the standard look, you can still access the old UI by clicking the "New Theme" button in the top right corner of the homepage.

Please note that the old theme will be phased out by January 2024. To make a smooth transition, we recommend getting acquainted with the new theme. One significant change is that the Request, Expense, and Approval modules are now only accessible via the "Home" dropdown in the top left corner of the Concur homepage.

For a visual guide, watch our [video](#) on the new Concur User Interface. If you have any questions about these UI changes, reach out to us via [Services & Support](#).

**Update to Law AB 1887**

As of September 13, 2023, Governor Gavin Newsom signed [SB 447](#) which ends the ban on state funded travel effective immediately. Former **Law AB 1887** which “prohibited state-funded travel to states that had passed a law after June 26, 2015 that (1) authorized discrimination based on sexual orientation, gender identity, and gender expression, or (2) voided or repealed existing state or local protections against such discrimination” is no longer in effect. This update should not impact your upcoming trips, but if you have any questions please contact your fund manager.

**Oracle Financials Scheduled Maintenance 10/06/2023**

Oracle Financials Cloud will be down for scheduled maintenance on **Friday 10/06/2023** from **7:00 PM through 11:00 PM**.



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 | Connexus \(ucop.edu\)](#)

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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 knowledge and understanding from a useful and information packed session. Don't miss it!

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**Internal Controls & Accounting Office Hours**

**Last Wednesday of the month @ 1:00pm - 2:00pm**

Join our Internal Controls & Accounting team for office hours the last Wednesday of each month as a platform for discussion related to General Ledger related transactions, Intercampus Recharges, and Payroll reconciliation. ICA team will provide any updates available and the session will be open for Q&A.

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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).

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!



**Split amounts using Currency**

When splitting costs in Manage Project Costs (for Splits or Split & Transfers), be sure to only enter currency amounts (2 digits past the decimal point) IF the unit of measure is Currency. Otherwise, rounding issues can occur that will not net to zero.

Project Name

FD FISS Qualcomm

Task Name

ECE Qualcomm Day (RN731)

Contract Number

Funding Source

Quantity

62.88

Unit of Measure

Currency

Billable

Yes

Capitalizable

No

Details

Actions 

+

**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) is

**Self-Service Resources:**

- Your Immediate Supervisor
- [Budget & Finance Help Center](#)
- [Knowledge Base Articles](#)
- [Community of Practice](#)
- [Published Information in Black](#)
- [Training Modules](#)

**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 Services & Support
  - E.g. "I need you to process/approve/route..."

**Resources:**

- [Attend an Office Hours session](#)
- [Contact the Finance Help Line](#)
- [Submit a support ticket to Services & 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 request 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](mailto:finance.support@ucsd.edu)
- Submit a ticket to [Budget & Finance Services](#)
- 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
- Oracle & Concur financial reporting enhancement

**Resources:**

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

[View the full Support Framework on Black](#)

UC San Diego  
BUDGET AND FINANCE SERVICES



## Have Finance-related questions?

### Call the UC San Diego Finance Help Line.

**( 8 5 8 ) 2 4 6 - 4 2 3 7**

**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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