May 31, 2023 - Today's Digest

**Corporate Resource Management**

![Image](https://example.com/image1.png)

- **Travel Process Overview**: This course provides an overview of UC San Diego travel policy and the trip reconciliation procedure, including summarized requirements. This virtual training is set to occur every 2nd (second) Tuesday of the month, starting on Tuesday, July 12, 2022.

- **Oracle: Buying and Paying for PO Requisitioners**: 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, and 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.

- **PPM Contract and Invoice Training**: Starting Tuesday, July 7, 2022 @ 9:00am - 11:00am, this course is designed to help the Budget & Finance community, including faculty or staff with financial administration duties, learn about the PPM process. It will cover the basics of contract and invoice creation and management, as well as how to handle exceptions and resolve issues.

- **Research Administration Activity Dashboard**: At next week’s office hours, representatives from the Office of Contract and Grant Administration (OCGA) will demo the Research Administration Activity Dashboard and answer your questions about the recent reorganization of OCGA. Every Monday @ 11:00am - 12:00pm.

- **Fund Management Office Hours**: Every Thursday @ 11:00am - 12:00pm, this event will provide an overview of the recently released Project Setup to GL Match Errors report and answer any related questions. Attendees can submit questions in advance or ask questions during the event.

- **Internal Controls Office Hours**: Every Monday @ 11:00am - 12:00pm, representatives from the Office of Internal Controls will discuss topics related to internal controls and compliance with internal control framework requirements. This event is open to all interested parties and provides an opportunity to ask questions and receive guidance.

**Oracle Procurement Request Forms**

- **Introduction to Oracle Procurement & Payables eCourse**: Starting Tuesday, July 12, 2022 @ 9:00am - 11:00am, this course is designed to help attendees understand the basics of Oracle Procurement & Payables and its role in the overall procurement process. It will cover topics such as how to create and manage requisitions, purchase orders, and invoices.

**Best Practices**

- **New Oracle Procurement Request Form Structure**: This form is designed to help the Budget & Finance community, including faculty or staff with financial administration duties, better understand the requisition and purchase order process. It includes enhanced search and approval capabilities to make the workflow more user-friendly.

- **Oracle Procurement Request Forms**: This form is meant to be used when a quote is issued to you by a supplier for the purchase of goods. It allows for easy tracking of quotes and purchase orders. This form is also useful for obtaining an overview and checklist of the business travel lifecycle. If you are new or an infrequent user of PPM, a comprehensive training session will be provided.

- **PPM Contract and Invoice Request Forms**: These forms are used to request goods or services from vendors. They are designed to be used when a vendor has been selected through the PPM process, and the request is for goods or services that cannot be obtained through the online requisition system. These forms are also used for requests that require a PO number or are outside the scope of the online requisition system.

**Tips & Tricks**

- **Oracle Procurement Request Forms**: These forms are used to request goods or services from vendors. They are designed to be used when a vendor has been selected through the PPM process, and the request is for goods or services that cannot be obtained through the online requisition system. These forms are also used for requests that require a PO number or are outside the scope of the online requisition system.

**Other Resources**

- **Phase 1 to Phase 2 Reconciliation**: This process is used to reconcile a bill with an invoice for goods or services purchased. It is a required prerequisite for registration.

**Calendar Events**

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

- **Call the UC San Diego Finance Help Line**: For quick links to various resources available to you.

- **July Virtual Instructor-Led Training Classes**: Please feel free to use our Event Calendar to plan your next training session. This calendar will be updated regularly to ensure you have access to the most current information.

**Conclusion**

Thank you for your participation in the Core Resource Allocation survey last month. There were 104 respondents from 8 departments who participated in the survey. Our goal is to deliver timely information that matters to you. Please continue to check the UC San Diego Budget & Finance Weekly Digest for quick links to various resources available to you.