Budget & Finance Weekly Digest

July 5, 2022 | 78th Edition

Announcements

New Oracle Procurement Request Form

A new request form has been launched in Oracle Procurement: Goods - Quoted Orders. This request form is identical in structure to the other goods request forms. This form is meant to be used when a quote is issued to you by a supplier for goods. You may combine all taxable items into one line item, add the form to your cart, then complete the form a second time for all non-taxable items. For a review of when to use the different request forms in Oracle Procurement, you may review the Request Forms Blink page.

Please feel free to submit a ticket (Buying Goods & Services - Oracle Procurement - Procurement Forms) if you have any questions!

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

Internal Controls Office Hours

Every Monday @ 11:00am - 12:00pm

Join the Internal Controls Office Hours to ask questions regarding the internal controls guidance posted on the Best Practices in Internal Controls Blink page.

Fund Management Office Hours

Every Thursday @ 11:00am - 12:00pm

Come to this week's office hours to see a demo of the newly released Project Setup to GL Match Errors report and get your questions answered about what you need to do next.

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.

Oracle: Buying and Paying for PO Requisitioners

Thursday, July 7, 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.

Please note the Introduction to Oracle Procurement & Payables eCourse is a required prerequisite for registration.

PPM Contract and Invoice Training

Starting Tuesday, July 12, 2022 @ 10:00am - 11:00am

Register for this comprehensive training course providing instruction on contract, event, and invoice creation and requirements. This virtual training is set to **occur every 2nd (second) Tuesday of the month,** starting on Tuesday, July 12 and will reoccur on 08/09, 09/13, 10/11, 11/08.

Concur: Event and Expense Reimbursements

Thursday, July 14, 2022

9:00am - 11:00am

This live course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. Intended for preparers, hosts/payees, and financial managers who are familiar with policy and would like to learn about the expense reconciliation process in Concur.

UC San Diego Travel: Before You Go

Thursday, July 28, 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 travelers and preparers also attend the *UC San Diego Travel: Reporting Expenses* course before the trip concludes.

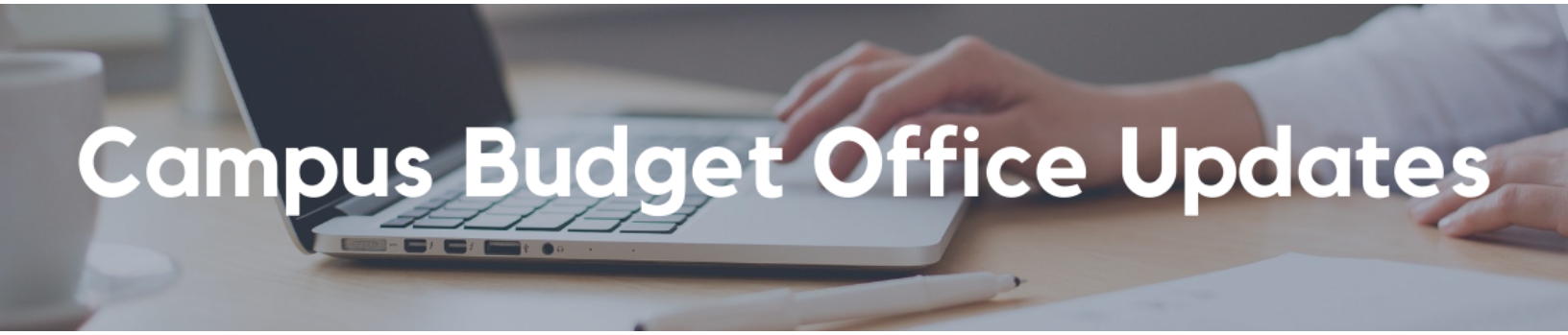
UC San Diego Travel: Reporting Expenses
Thursday, July 28, 2022
1:00pm - 3:00pm
This course provides an overview of UC San Diego travel policy and the trip reconciliation procedure, including summarized guidelines and on-demand resources. Faculty and staff will learn about the Concur processes for claiming travel expenses on a Travel Expense Report.

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

(858) 246-4237 **Tuesdays - Thursdays | 10:00am - 12:00pm & 1:00pm - 3:00pm**

Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer Finance-related questions.

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!



Core Fund Resource Allocations Survey Results
Thank you for your participation in the Core Resource Allocation survey last month. There were 104 respondents from 8 different VC areas. 79% of respondents indicated a preference for an annual lump sum allocation. The Campus Budget Office plans to implement this change in the coming months.

If you have questions about the survey results or concerns about this change, please contact CBO via the Services & Support portal.

Travel and Entertainment Processes

As departments get ready to plan business travel, university events and business meals, take a moment to refresh your knowledge of policies and processes.

Review the Travel Process to obtain an overview and checklist of the business travel lifecycle. If you are new or an infrequent user of Concur, our Travel and Expense application, review the below links:

- Concur Request & Expense
- Concur Basics
- Concur FAQ

Has it been a while since you have hosted business events and reconciled entertainment expenses? Review the Entertainment Process for an overview of our Entertainment Policy and Meal Maximums.

Don't miss out on our upcoming July Virtual Instructor-Led Training Classes announced in the Training & Support section of this Digest.

The Support Framework: Your Guide to Finding Help

Learning all there is to know about budget & finance can feel daunting.

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 Group
- Knowledge Base Articles
- Community of Practice
- Published Information in Blink
- 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 Services & Support
  - E.g. "I need you to process/approve/route…"

Resources:
- Attend an Office Hours session
- Contact the Finance Help Line
- Submit a request ticket in 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 requests before escalating the ticket
- Identify something that does not seem to be working properly

Resources:
- Contact the central support team directly at financesupport@ucsd.edu
- Submit a ticket to Budget & Finance Support
- Find the form in our Request 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 Suggestion Box
- Business Analytics Hub Help Page

View the full Support Framework on Blink.

UC San Diego
BUSINESS AND FINANCIAL SERVICES

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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