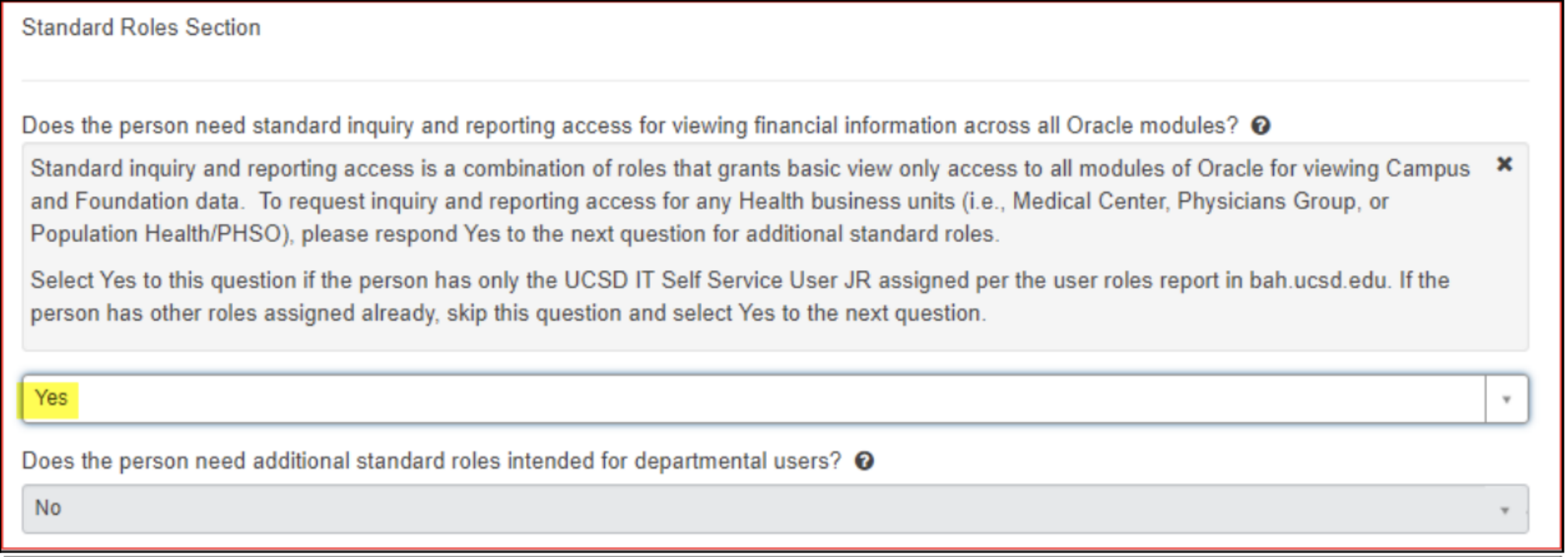
January 31, 2023 | 106th Edition

Oracle & Concur Role Request Form Updates
The Oracle & Concur Role Request Form in Services & Support has been updated to improve functionality and approval processing.

For new role requests, when submitters select a “Yes” response for the first question the form will automatically block the response for the second question and vice versa. This change was made to restrict users from submitting an improper role request.

Select “Yes” to the first question (Does the person need standard inquiry and reporting access for viewing financial information across all Oracle modules?) only after checking the roles assigned to the user and confirming the user only has the UCSD IT Self Service JR role assigned. To look up roles, see KB0032242 - How to Look Up User Roles in Oracle.



Standard Roles Section

Does the person need standard inquiry and reporting access for viewing financial information across all Oracle modules?

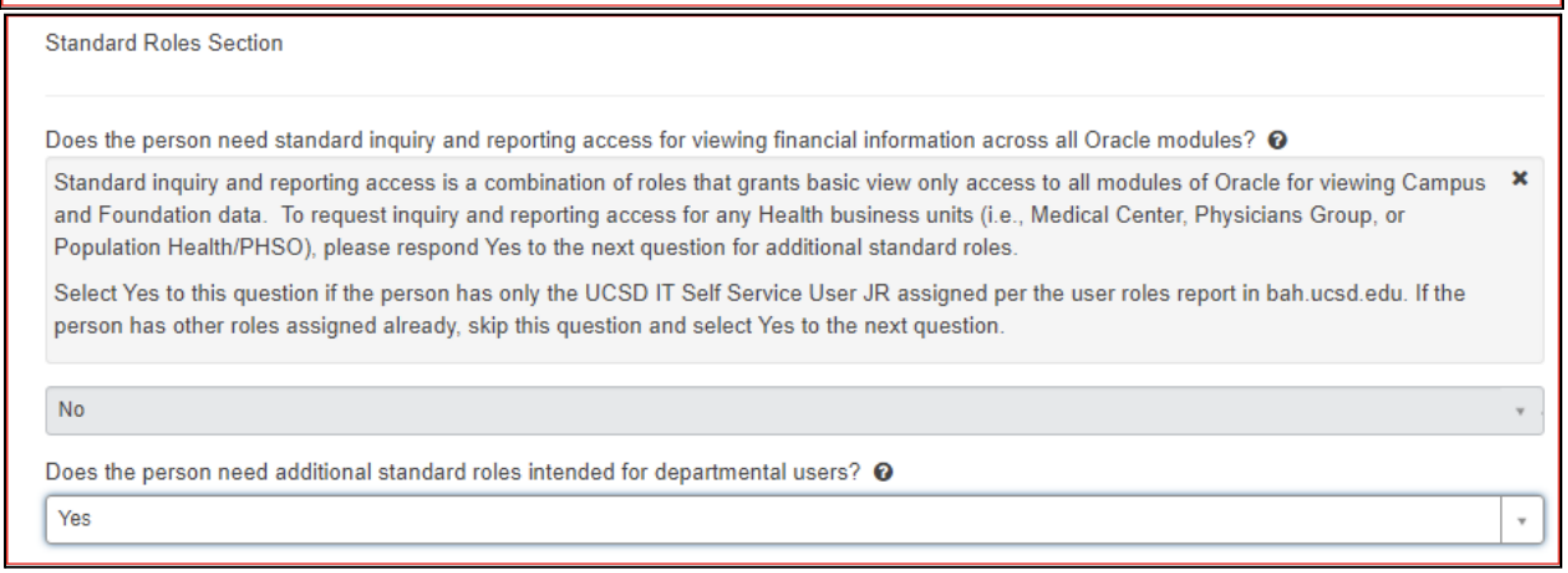
Standard inquiry and reporting access is a combination of roles that grants basic view only access to all modules of Oracle for viewing Campus and Foundation data. To request inquiry and reporting access for any Health business units (i.e., Medical Center, Physicians Group, or Population Health/PHSO), please respond Yes to the next question for additional standard roles.

Select Yes to this question if the person has only the UCSD IT Self Service User JR assigned per the user roles report in bah.ucsd.edu. If the person has other roles assigned already, skip this question and select Yes to the next question.

Yes

Does the person need additional standard roles intended for departmental users?

No



Standard Roles Section

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Standard inquiry and reporting access is a combination of roles that grants basic view only access to all modules of Oracle for viewing Campus and Foundation data. To request inquiry and reporting access for any Health business units (i.e., Medical Center, Physicians Group, or Population Health/PHSO), please respond Yes to the next question for additional standard roles.

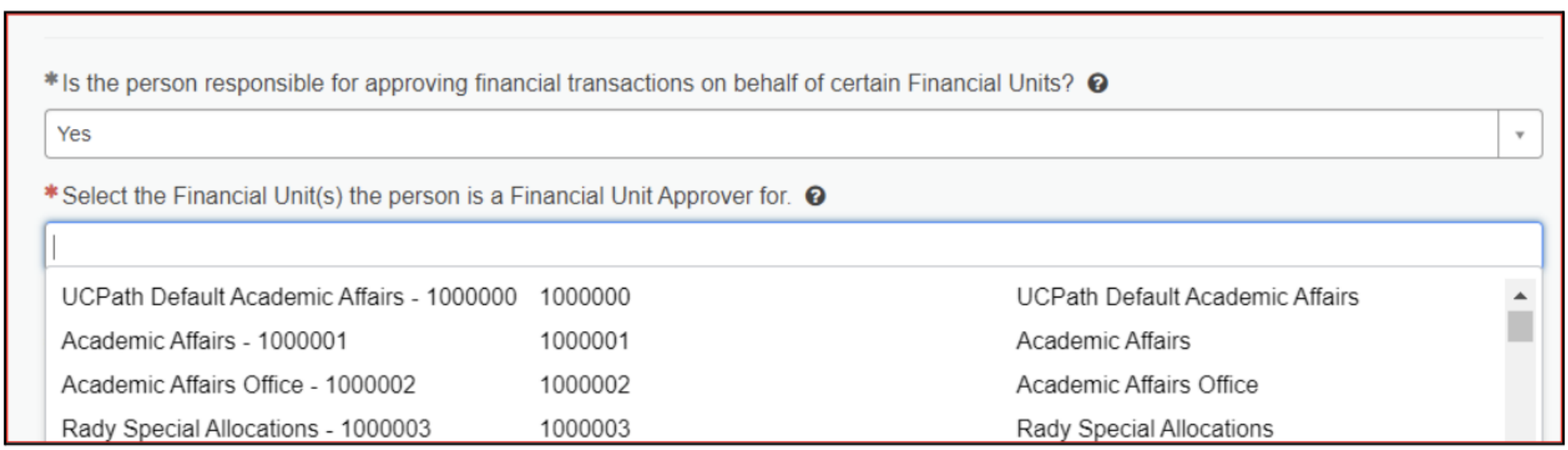
Select Yes to this question if the person has only the UCSD IT Self Service User JR assigned per the user roles report in bah.ucsd.edu. If the person has other roles assigned already, skip this question and select Yes to the next question.

No

Does the person need additional standard roles intended for departmental users?

Yes

For all workflow role requests, submitters will see the financial unit code listed for each question. The financial units are listed in order of financial unit code. Submitters can search for the financial unit to select by entering the financial unit name or the code.



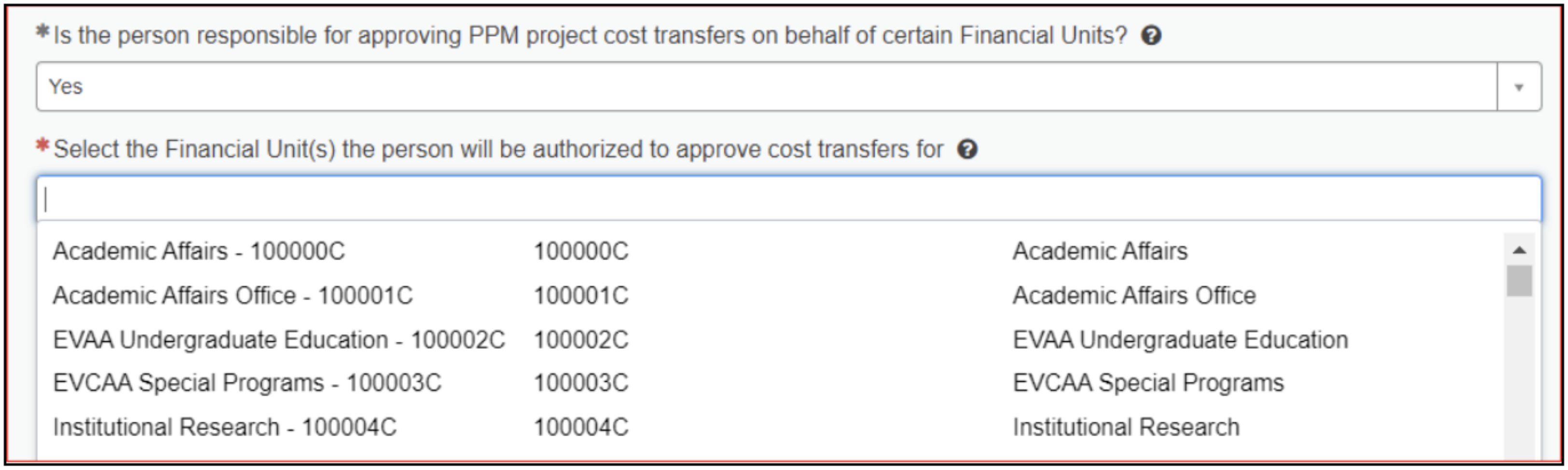
*Is the person responsible for approving financial transactions on behalf of certain Financial Units?

Yes

*Select the Financial Unit(s) the person is a Financial Unit Approver for.

UCPath Default Academic Affairs - 1000000	1000000	UCPath Default Academic Affairs
Academic Affairs - 1000001	1000001	Academic Affairs
Academic Affairs Office - 1000002	1000002	Academic Affairs Office
Rady Special Allocations - 1000003	1000003	Rady Special Allocations

For cost transfer approver role requests, submitters will see the level 4 financial unit codes only. Cost transfer approvals are only done at the level 4 financial unit.



*Is the person responsible for approving PPM project cost transfers on behalf of certain Financial Units?

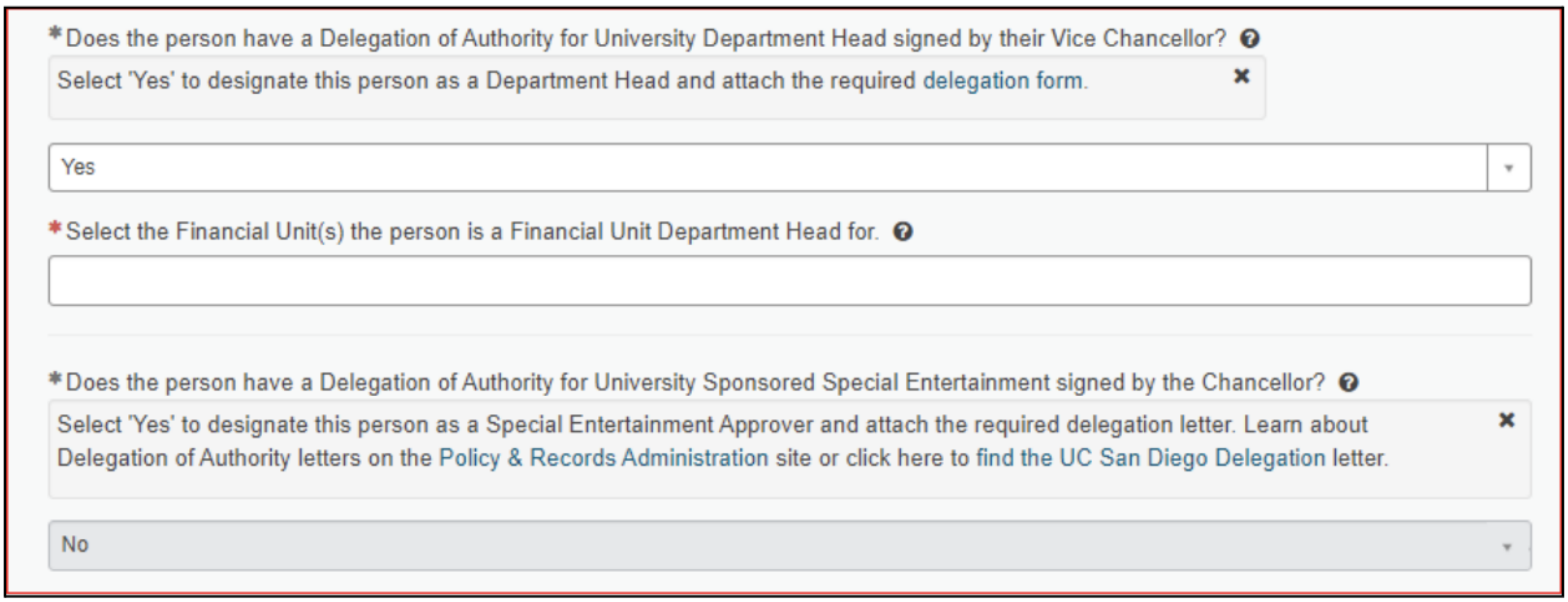
Yes

*Select the Financial Unit(s) the person will be authorized to approve cost transfers for

Academic Affairs - 100000C	100000C	Academic Affairs
Academic Affairs Office - 100001C	100001C	Academic Affairs Office
EVAA Undergraduate Education - 100002C	100002C	EVAA Undergraduate Education
EVCAA Special Programs - 100003C	100003C	EVCAA Special Programs
Institutional Research - 100004C	100004C	Institutional Research

For Concur workflow role requests, when submitters select a “Yes” response to the department head approver question (Does the person have a Delegation of Authority for University Department Head signed by their Vice Chancellor?) The form will automatically block the response for the special entertainment approver question (Does the person have a Delegation of Authority for University Sponsored Special Entertainment signed by the Chancellor?) and vice versa. This change was made to restrict users from submitting an improper role request.

Please note that Concur does not assign the department head approver level and the Special Entertainment approver level for the same financial unit. A person can only have one level of authority assigned to them per financial unit.



*Does the person have a Delegation of Authority for University Department Head signed by their Vice Chancellor?

Select 'Yes' to designate this person as a Department Head and attach the required delegation form.

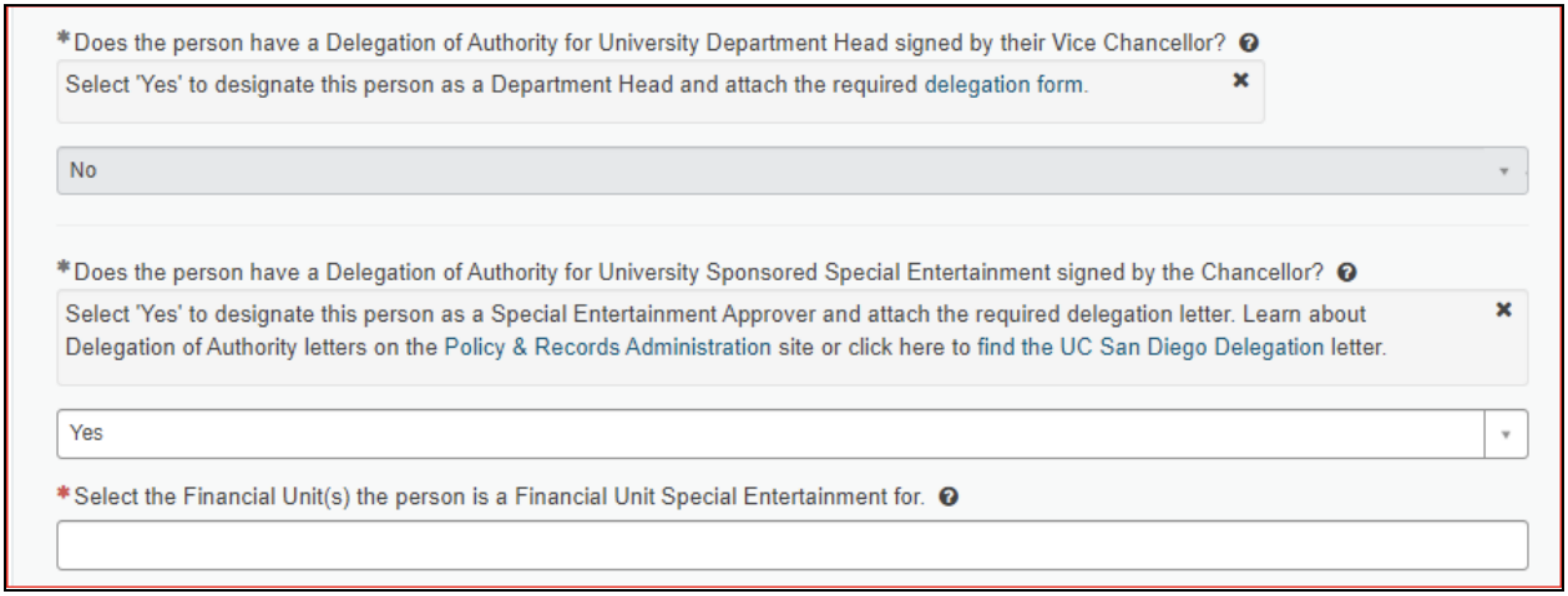
Yes

*Select the Financial Unit(s) the person is a Financial Unit Department Head for.

*Does the person have a Delegation of Authority for University Sponsored Special Entertainment signed by the Chancellor?

Select 'Yes' to designate this person as a Special Entertainment Approver and attach the required delegation letter. Learn about Delegation of Authority letters on the Policy & Records Administration site or click here to find the UC San Diego Delegation letter.

No



For role request approvers, you will see the workflow approval level:

- "Approval for DH" means the approver is reviewing the Department Head approver level
- "Approval for FINU" means the approver is reviewing the financial unit approver level
- "Approval for PCARD" means the approver is reviewing the Procurement Card Administrator level
- "Approval for SE" means the approver is reviewing the Special Entertainment approver level
- "Approval for CT" means the approver is reviewing the cost transfer approver level

Role request approver groups will be renamed soon to align the group name with the associated financial unit code. When reviewing role requests for approval, please be sure to note the level and the financial unit for the approval item before clicking on the item to review it.

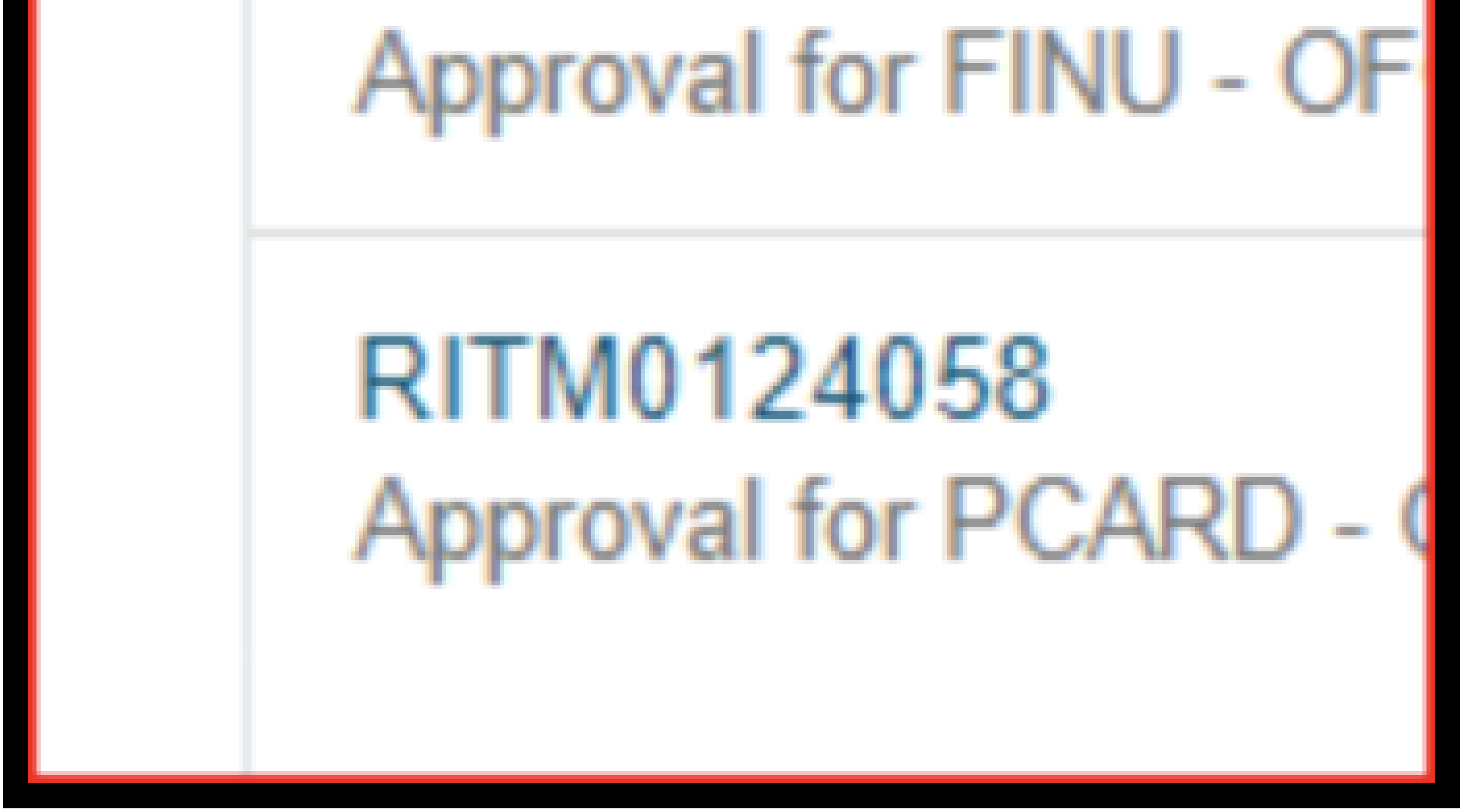
Home / Approvals

My Approvals

Approving

RITM0124058
Approval for DH - OFC-

RITM0124058



Who will be impacted?

- Anyone using the Oracle & Concur Role Request Form in Services & Support to request workflow roles and access
- Anyone who is approving Oracle & Concur role requests in Services & Support

Resources

See KB0032979 - How To Review Oracle & Concur Access Requests as an Approver
See KB0032200 - How to Determine the Oracle & Concur Standard Roles Departmental Preparers Need
See KB0033631 - How to Request Oracle System Roles (Standard Roles)
See KB0032695 - How to Request a Concur Approver Role

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

Fund Management Office Hours
Every Thursday

11:00am - 12:00pm
At this week's office hours, we will be hosting a demo of the new Department Operations Dashboard. Come get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

[Reporting Workshop: Dashboard of the Week Series]
Monday, February 6 @ 11:00am - 12:00pm
Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include an interactive report demo, discussion of what questions the report can answer, opportunities to ask questions and walk through your use cases, and hear how others are using the dashboard or report. Next week's session will feature the **Transaction Details.**

NEW! Financial Accounting Program: Upcoming Information Sessions
We invite you to hear more about the Financial Accounting Program by attending an upcoming Information Session for the following dates. Please register using links below:

- Tuesday, February 14, 2023 @ 10:00am - 11:00am
- Thursday, February 16, 2023 @ 1:00pm - 2:00pm

This program is currently being offered at no cost to you! We encourage you to share this information with your teams, colleagues, and those who may be interested in participating in the program or taking the assessment. We appreciate the partnership with UC San Diego Division of Extended Studies and the support from supervisors across campus and health sciences.

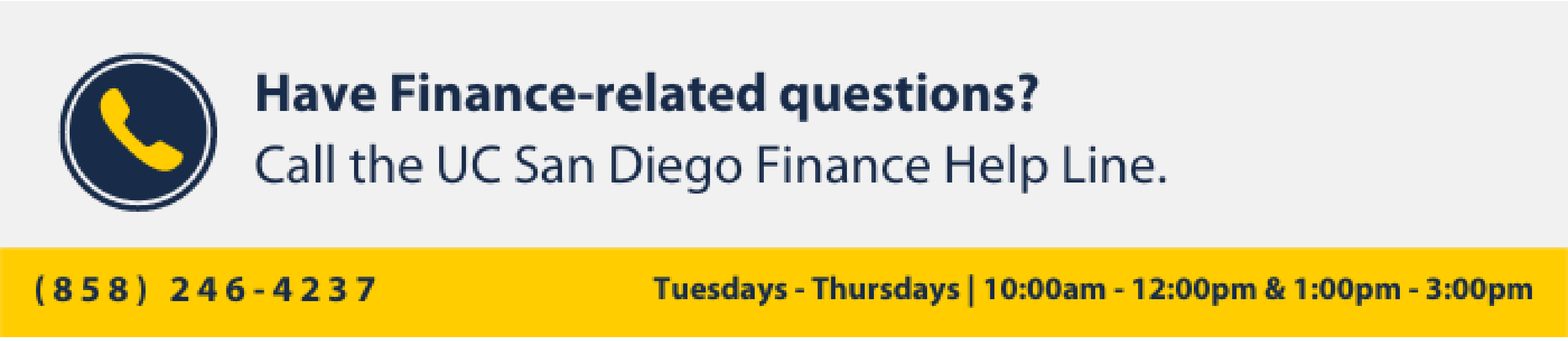
IPPS Hot Topics: Concur on Your Device
Wednesday, February 22 @ 10:00am - 11:00am
Learn about various mobile and electronic features available with Concur that can make your travel and reconciliation easier.

Oracle: Buying and Paying for Goods & Services
Thursday, February 23 @ 9:00am - 11:00am
This course will be especially valuable for employees who want to further their understanding of buying on campus or those who will be approving requisitions or invoices. Instruction will involve an introduction to Oracle Procurement as well as hands-on practice and feedback to gain valuable, practical experience. Intended for fiscal administrators, fund managers and financial managers who are familiar with sponsored award management on campus and would like to learn about more advanced buying terminology and concepts.

Topics Covered:

- Shopping for and purchasing goods and services
- Searching across UC San Diego requisitions and POs
- Approving invoices and requisitions
- Closing POs
- Processing NonPO payments through Oracle Procurement
- Checking PO and NonPO invoice status
- Receiving credits through refund checks

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).

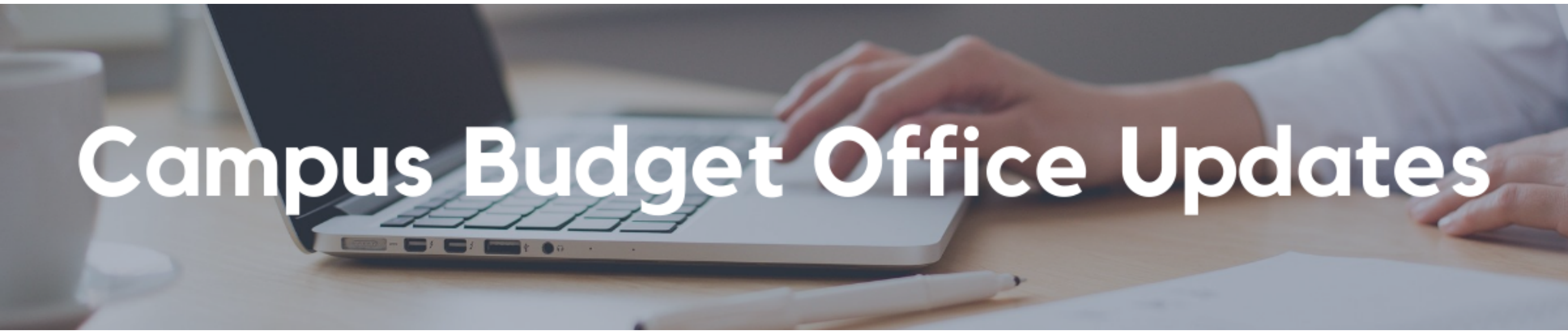


Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer Finance-related questions.

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!

NEW! Department Operations Dashboard
The new Department Operations Dashboard provides year-to-date overall net financial surplus or loss by Managerial Fund categories, Mission, or Project Classification. It is intended to help department fiscal managers, MSOs, DBOs, and Assistant Deans understand the health of their operations. The dashboard is accessible from the Business Analytics Hub under the **Budget and Financial Management** tab. For more information about the dashboard, visit the Department Operations Dashboard Blink page and join the Fund Management office hours this week to see a demo.

This dashboard is a result of the feedback, testing, and work done by the following members of the Fiscal Managers Reporting Workgroup: *Jennifer Mathews, Anna Nordeen, Devaney Kerr, Tami Stein, Jillian Kochan, Jamie Atkinson, Becky Uhl, Hanna Choe, Teresa Wassum, Ariel Tam, Yani Salas, Daniel Redfern, Heather Fagan, Eva Thiveos, & Beverly Randez.*



NEW! 2023-24 Campus Budget Development Cycle Begins This Week - Don’t Forget to Register for Training!

REGISTER NOW!
Web-Based Application (In Person or Zoom Sessions):
Oracle Budget: Budgeting Salaries and Benefits for Admin Units
Oracle Budget: Budgeting Salaries and Benefits for Academic Units
Oracle Budget: Non-Compensation Expense Planning
Smart View Application:
Oracle Budget: Budgeting Salaries & Benefits in Smart View
Oracle Budget: Budgeting Non-Compensation in Smart View
Oracle Budget: Budgeting Capital Projects
Smart View Reporting:
Oracle Budget Data: Smart View Ad Hoc Tips and Tricks (Beginner)
Oracle Budget Data: Smart View Ad Hoc Querying (Intermediate/Advanced)

COMING SOON!

Oracle Budget: Budgeting at UCSD is a new self-based training resource that covers the use of both the web application and Smart View to build your budget in EPBCS. This training will be live on UCLC in the coming days so a link is forthcoming.

Need or Know Someone Who Needs Access to EPBCS? Request access via the Services and Support portal **https://blink.ucsd.edu/finance/resources-training/get-started/access-requests.html**.

Who is a Budget Preparer? Budget preparers are individuals assigned by their department to create and manage financial unit budgets. The Budget Preparer role could be responsible for budget entry or final review & approval. Not sure if you're responsible for preparing the budget for your Financial Unit in the Oracle Planning and Budgeting system? Please consult with your Vice Chancellor Office.

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).

How to Add a Line to an Existing Purchase Order
Earlier this month, the ability to add a new line to an existing Purchase Order was added to Oracle Procurement. You can review our KBA for more information on how to do this, as well as how this feature can be used to change the POETAF/COA referenced on a partially invoiced PO.

Request Forms in Oracle Procurement

As you may have noticed, the request form offerings in Services & Support was greatly reduced and changed. Request forms can be used to order items that cannot be found in Advanced Search or punchout offerings. If you want guidance on these new forms, we would first recommend referring to our Request Forms Overview video guide. Once you know which form is appropriate for your purchase, refer to our Ordering Goods & Services with Request Forms video guide for more assistance in completing the proper form.

Advanced Search Feedback

Do you have any feedback about the Advanced Search feature in Oracle Procurement? Fill out the Advanced Search Survey or send feedback to UCSDFeedback@labviva.com. Both of these links can be found on the Advanced Search landing page.

Did You Know?

Keeping your Travel Profile in Concur updated will streamline the booking process and assure that you're getting your loyalty reward program benefits. Check regularly to make sure your payment cards are current and that no information has changed. Add loyalty rewards numbers, travel arrangers, emergency contact info, special preferences, and more! Concur requires certain fields but completing your full profile with current information only benefits you, the traveler.

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