Learning all there is to know about budget & finance can feel daunting. However, certain fields but completing your full profile with current information only benefits you, the traveler. Add loyalty rewards numbers, travel arrangers, emergency contact info, special preferences, and more! Concur requires

Do you have any feedback about the Advanced Search feature in Oracle Procurement? Fill out the Advanced Search Feedback form.

Join our Community of Practice (COP) and participate in the Financial Reporting Workgroup.

This dashboard is a result of the feedback, testing, and work done by the following members of the Fiscal Managers Reporting Workshop: Dashboard of the Week Series

The new Department Operations Dashboard provides year-to-date overall net financial surplus or loss by Managerial Fund. This training will be live on UCLC in the coming days so a link is forthcoming.

Oracle Budget Data: Smart View Ad Hoc Querying

Oracle Budget: Budgeting Salaries & Benefits in Smart View

Oracle Budget: Budgeting Salaries and Benefits for Academic Units

Oracle Budget: Budgeting Salaries and Benefits for Admin Units

Web-Based Application (In Person or Zoom Sessions):

Topics Covered:

- advanced buying terminology and concepts.

Oracle: Buying and Paying for Goods & Services

This course will be especially valuable for employees who want to further their understanding of buying on campus or those purchasing items for their department.

Thursday, February 23 @ 9:00am - 11:00am

Oracle & Concur Role Request Form Updates

Anyone using the Oracle & Concur Role Request Form in Services & Support to request workflow roles and access has been updated to improve functionality and approval.

KB0033631 - How to Request Oracle System Roles (Standard Roles)

KB0032200 - How to Determine the Oracle & Concur Standard Roles Departmental Preparers Need

KB0032979 - How To Review Oracle & Concur Access Requests as an Approver

KB0033005 - How to Request Oracle System Roles (Accounting Roles)

KB0001095 - Change Prompt - Oracle & Concur Role Request Form

Click to access the Department Operations Dashboard.

Who will be impacted?

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

- "Approval for CT" means the approver is reviewing the cost transfer approver level
- "Approval for SE" means the approver is reviewing the financial unit approver level

Be sure to try out the different calendar views in the upper right corner!

Finance-related content under the

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

At this week's office hours, we will be hosting a demo of the new Department Operations Dashboard. Come get your response for the second question and vice versa. This change was made to restrict users from submitting an improper role request.

Receiving credits through refund checks

Processing NonPO payments through Oracle Procurement

Approving invoices and requisitions

Shopping for and purchasing goods and services

Anyone using the Oracle & Concur Role Request Form in Services & Support has been updated to improve functionality and approval.

Request access via the Services and Support portal.

UCSDFeedback@labviva.com

January 31, 2023

106th Edition

Finance-related content under the

Blink page and join the
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:

1. **What can I do on my own?**
2. **Where can I get help?**
3. **Who can help escalate?**
4. **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.