Budget & Finance Weekly Digest

May 4th, 2021 - 18th Edition

Announcements

Oracle Financials Cloud

Sigma Aldrich Catalog Updated
The Sigma Aldrich prices have been updated in Oracle Procurement, and the catalog has been re-published. Along with ordering from their punchout, you may now also find their items by searching in the Oracle Procurement catalog.

Click to view all known transitional issues impacting financial processes and reports. This list was curated specifically to support financial review and corrective actions by department fund managers.

Getting Ready for Fiscal Close

We've added a new section to the Weekly Digest to help prepare you for Fiscal Close!

Cancel your Rejected Requisitions
When a requisition is rejected, its commitment will persist in your PPM ledger. The individual who submitted the requisition can lift the commitment by going to the requisition, clicking *Actions* at the top right, then *Cancel Requisition*. If you would like to cancel a requisition not belonging to you, you must first go to the requisition, click *Actions* at the top right, and *Reassign* the requisition to yourself.

Submit Your Concur Documents
Take a look at the Request and Expense modules in Concur for any Requests/Expense Reports that have been pending department approval, or

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should be submitted before fiscal close. Refer to our KBA for detailed instructions on How to Check the Status of a Concur Request and Expense Report. Approvers should review the Approvals module in Concur for any Concur documents pending their review.

Reminder:

- **Travel and Entertainment Expenses**: Submit Expense Reports and Event Expenses **within 45 days** after the trip or event has occurred
- **Procurement Card Transactions:** Submit Expense Reports on a **monthly** basis

ISIS Student Billing
Departments requiring student accounts receivable billing charges to be reflected on the student account/June ledger must create charges by **May 7**.

Training & Support

Office Hours Support
Office hour updates have been posted for Accounts Receivable, Cash, & PPM General Projects, BI & Financial Reporting, and **Fund Management** (back by popular demand)! Additionally, attend a special office hour held on May 21, 2021, from 9:00-10:00 a.m. where we will answer questions related to the fiscal closing process

Concur Travel & Expense

University Procurement Card Program
Tuesday, May 11, 2021 @ 1:30pm - 4:00pm
The course will include more in-depth explanations of changes to the University Procurement Card Program. The team will go over the process for card requests and card transaction reconciliation via Concur. This is not an introductory course. Participants should first complete the associated eCourse available through the UC Learning Center.

Travel & Expense Live Training Classes
There will be a pause in June for the courses: Concur: Event and Expense Reimbursements, UC San Diego Travel: Before You Go and UC San Diego Travel: Reporting Expenses. The team will be focused on fiscal close activities. Courses will resume in the new fiscal year. Spots are still available for the May

Please note that you can also search “Concur” in the UC Learning Center to browse through instructor-led Concur courses.

Visit the Training & Events Calendar for information on upcoming webinars.

Tips & Tricks

Oracle Financials Cloud

Revising and Canceling Purchase Orders
Refer to our new How to Cancel a Purchase Order in Oracle Procurement KBA for instructions on canceling a PO. For instructions on processing change orders to make other revisions on your orders, you may refer to the How to Create a PO Change Order in Oracle Procurement KBA. Remember to call the supplier to confirm you can revise or cancel your order before taking action.

Concur Travel & Expense

Submitting Group Travel Expense Reports
A new KBA has been published, highlighting key concepts and instructions for users and their delegates to reconcile Group Travel in Concur. Remember that only expenses incurred by the group leader should be claimed on the Group Travel Expense Report.

Services & Support

SNOW? ServiceNow? Services & Support?
Is it ServiceNow or SNOW? While we might refer to it by different names, the official name of the application is Services & Support. Just remember support.ucsd.edu for all your questions and requests.

Here's what you need to know about the portal.

About the Weekly Digest

Each Tuesday important updates related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense, are delivered to your inbox. Our goal is to deliver timely information that matters to you.

Contact us

Have questions about this edition? The best way to contact our team is via Services & Support.

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial information system and support departments' success in managing their fiscal responsibilities.
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