Budget & Finance Weekly Digest



June 7, 2022 | 74th Edition

Announcements



ESR Finance Systems Update: From Stabilization to Optimization
Two years ago, UC San Diego implemented our new finance systems during a stressful pandemic. While our systems are now functioning as intended, the campus community is still adjusting to this new way of operating. In our recent quarterly survey of Oracle users and faculty/researchers, we heard resoundingly that while there has been slight progress in the majority of areas, overall this stabilization period has taken too long and caused an immense amount of frustration. We are truly sorry this delayed stabilization period has caused so much pain and instability. In order to address ongoing concerns, we plan to transition into the next phase focused on process and system optimization.

To learn more about our support strategy, please visit the Financial Management website.

New Operating Guidance Memo: Sales & Service Activities
New BFS Costing Policy & Analysis Office operating guidance has been published for Sales & Service Activities. Read the full document here.

Procurement Card Notification Email Enhancement
Starting on June 13, you may notice a change in the Concur notification emails for **Procurement Card transactions**. We have made changes to the frequency of when these notification emails will go out. In addition, we have also changed some of the language within the emails to provide more clarification on what action is being requested. As of June 13, the frequency for Concur notification emails for the Procurement Card will be as follows:

- For Procurement Card Expenses or Expense Reports that have the status ***Unassigned, Not Submitted, Not Approved*** at:
    - 15 days: one notification email reminder will be sent to the Cardholder and Delegate

    - 25 days: one notification email reminder will be sent to the Cardholder and Delegate
    - 30 days: every 2 days, a notification email will be sent to the Cardholder and Delegate to take action
    - 45 days: every weekday, a notification email will be sent to the cardholder and delegate to take action
- **Why are these emails being sent?**
    - To remind Cardholders that there are unassigned transactions, transactions on an unsubmitted Expense Report, or an Expense Report is pending approval
- **What do I need to do?**
    - Ensure that all Procurement Card charges are assigned to an Expense Report. Then, submit the Expense Report and ensure it receives proper approvals
    - These notification emails will **ONLY** go to the **Cardholder** and **Delegate**
        - Unfortunately, Concur configurations do not allow for us to include the Supervisor, Department Administrator (DA) or Financial Unit Approver
    - An Expense Report is considered complete when these status in Concur states ***Sent for Payment*** or ***Processing Payment***

To find out what the different Expense Report statuses mean, visit the Procurement Card FAQ Blink page.



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, Matt Frankos, Director of Payroll Accounting, will be on hand to answer your UCPath and payroll questions.

Accounts Payable Hold Approval Demo

Wednesday, June 8, 2022 @ 9:30am – 10:00am

IPPS will be hosting a demo during Office Hours to provide training and answer questions. Please consider attending, and encourage any of your Purchase Order Requesters to attend, for a detailed walkthrough on how to properly research and resolve these holds.

For those who are unable to attend, we will be posting a recording of the session to our YouTube channel.

Oracle: Buying and Paying for Financial Unit Approvers

Thursday, June 9, 2022 @ 9:00am - 11:00am

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as reviewing for and populating POETAF information during the ordering process, approving requisitions and invoices, revising orders, and checking PO invoice status. This course will be especially valuable for individuals responsible for those responsible for approving requisitions and invoices on behalf of their financial unit.

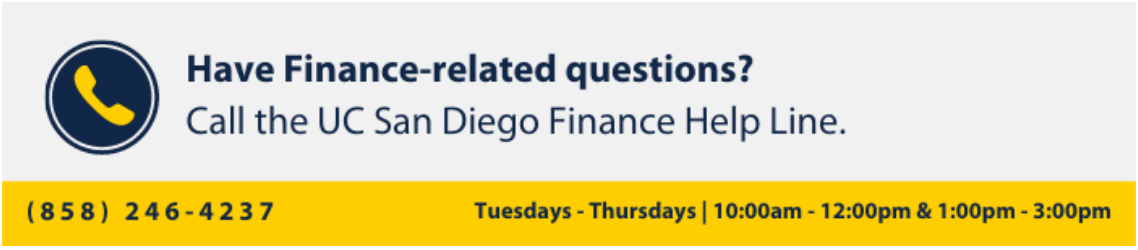
Please note the Introduction to Oracle Procurement & Payables eCourse is a required prerequisite for registration.

Oracle: Buying and Paying for PO Requisitioners

Thursday, June 16, 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.



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!



Enhancement: Faculty and Researcher Dashboard

The name selection on the Faculty and Researcher Dashboard has been enhanced to include AD username in addition to Last and First names. In the previous state, portfolios of faculty with the same first and last names were being blended together. Addition of the username delivers the portfolio of projects associated with the specific PI, project manager, or task manager. This

impacts users logging in as well: users with the same first and last name as another user will see only awards, projects, and tasks associated with their own username.



Personal Travel Dates During a Business Trip

Thinking of adding some personal travel dates during your business trip? No problem! Just make sure that the required documentation is provided when submitting your Concur expense report. Per UC Travel Policy G-28, comparable airfare is required when personal time is used while on business travel status. The traveler is eligible to receive reimbursement for whichever amount is lower. Please reference this Blink page for Travel Policy on Air Travel.

For additional questions on how to gather comparable airfare, please submit a ticket through Services & Support.

The Support Framework: Your Guide to Finding Help

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



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 **find answers**?
- Where do I go to **submit a request**?
- Where do I go to **submit an enhancement or idea**?

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.

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