Announcements

UC San Diego: Financial Accounting Program Update

The UC Financial Accounting Program (FA) training is a comprehensive program designed to provide financial accounting training. This program is intended to replace institutional knowledge that is currently owned by the UC San Diego staff financial community who are in financial and accounting roles.

The UC San Diego Financial Accounting Program is currently in development and is expected to be completed in the Fall of 2021. The program will provide resources on financial accounting topics including requirements when handling COVID-19 Event Planning and Attendance, UC Entertainment Policy, and Concur Tax Process.

Financial Management Office Hours

Thursdays 11:00am - 12:00pm

This recurring webinar takes place each Thursday of the month. Participants can register at any time and won’t have to watch a recorded version. Additional addional topics include providing lost and found services for the UC San Diego Financial Accounting Program. This live course will include an in-depth explanation of Concur processes and how to become an approver and best practices for departments managing their Concur. This session will cover the Approvals system in Concur – how it works, what it can do, and how to use it effectively.

Oracle: Buying and Paying for Financial Unit Approvers

Thursday, September 16, 2021 @ 9:00am - 11:00am

This course is designed for preparers, hosts/payees, and financial managers who are familiar with policy and would like to learn about the expense reconciliation process in Concur. This course will also be valuable for individuals responsible for those responsible for approving requisitions and invoices on behalf of their financial unit. This course will cover topics such as reviewing for and populating POETAF data in Concur, as well as talk about the managerial contrast expenses vs. expenditures, navigating, and other topics as needed.

Oracle Cloud Scheduled Maintenance

Oracle production environment will be down for maintenance from 7:00PM Sunday 09/19/2021 to 7:00PM Monday 09/20/2021. As updates are released, including enhanced user navigation, we will actively work to keep training materials, Blink guidance, and KBAs in sync with the releases. Starting Monday, September 20, the theme of the Global Header Icons will have an enhanced look and feel! This new theme is part of a larger Oracle initiated transition to a new look and feel! This new theme is part of a larger Oracle initiated transition to a new Look and Feel! This new theme is part of a larger Oracle initiated transition to a new Look and Feel and will be active!

Tips & Tricks

Non-Billable Page: Concur Tax Process

The Tax Process app will guide users through the Sales Tax Process, the Sales Tax Task Flow, and the Sales Tax Report. The Tax Process app also allows users to view the Sales Tax list, which reflects recently added or updated accounts, and other related information.

Business Meetings and Entertainment

Information about how to use Blink and the UC Cloud for Business Meetings and Entertainment can be found on the Raiser’s List of UC San Diego. This webinar will focus on Business Meetings and Entertainment, including how to cancel a reservation and submitting an event submission form for reimbursement.

Join the IPPS Team for the next session of Hot Topics! This is a monthly series of Zoom sessions held on Thursdays @ 11:00am - 12:00pm. This session will cover the Approvals system in Concur – how it works, what it can do, and how to use it effectively. This live course will include an in-depth explanation of Concur processes and how to become an approver and best practices for departments managing their Concur. This session will cover the Approvals system in Concur – how it works, what it can do, and how to use it effectively.

To view the Information Session and FAQs, please click Apply Now! This application closed to new entries, so please keep an eye out for future office hours, so come with your ideas! We will also be brainstorming topics and formats for future office hours, so come with your ideas!

The Financial Management Office will now be in a new format for future office hours, so come with your ideas! We are also using the WalkMe extension for additional validation to your transactions, announcements, and reminders. Please visit our website to learn more about our new WalkMe extension!

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