December 20, 2022 | 102nd Edition

Season's Greetings!!!
This is the last edition of the Weekly Digest in 2022. It will resume on January 10, 2023. We wish everyone a safe and enjoyable time away over the winter closure.

TIME SENSITIVE: Customer Invoices & PPM Contracts and Amendments
Invoices, PPM contracts, and amendments can be submitted for approval through **Thursday, December 22 by noon (12pm)**, and will resume on Tuesday, January 3, 2023.

REMINDER: Oracle and Concur Access Monitoring and Deprovisioning
Please be aware that Oracle and Concur user roles and access need to be reviewed by department managers and administrators across the University community periodically (i.e., more frequently than annually, or when an employee transfers or changes job responsibilities).

Who will be impacted?

- Department managers and administrators
- Employees transferring to another department
- Employees that change job responsibilities

Resources
To support the review and deprovisioning process, we have developed some resources available to you:

- Review the article on How to Manage Oracle Access for Employees that Transfer Departments
- Review the article on How to Look Up User Roles in Oracle
- Use the Oracle and Concur Role Removal form to request role removals

- If you are not familiar with the roles for departmental users, then please read the article on How to Determine the Oracle & Concur Roles Departmental Preparers Need

Updated Article on How to Find Your GL Journal Entry Approver

Users that submit GL journal entries can find their approver by using the recently updated Campus User Roles report and instructions on how to use that report are included in the updated article listed below.

Who will be impacted?

- Anyone with the UCSD GL Journal Entry JR role
- Users assigned as Line Managers (Journal Entry Approvers)

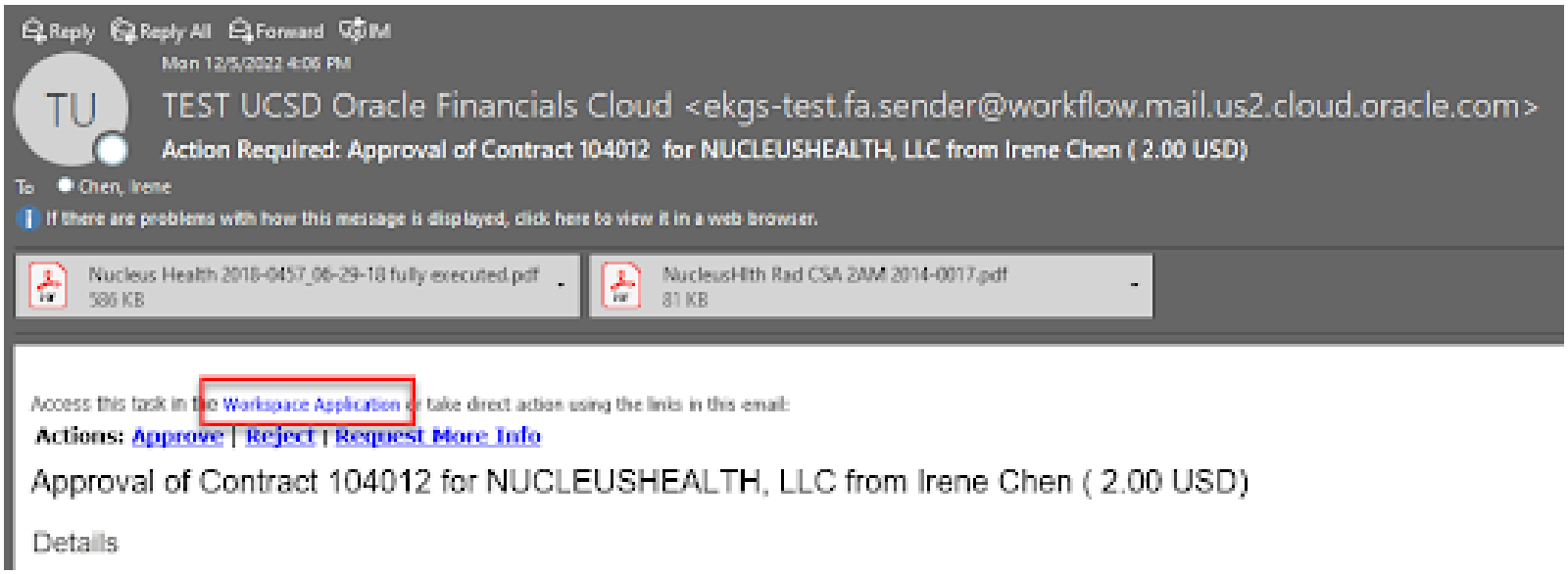
Resources

How to Find Your GL Journal Entry Approver

Workspace Application Tasks Enabled as Hyperlinks

Upon acting on the initial task, the Workspace Application worklist will display additional pending tasks as hyperlinks.

Who will be impacted? Approvers who review tasks pending their approval via the Workspace Application link in the Oracle email notification.



Oracle Procurement: Better Search Options One-Click Away in Jan 2023

Oracle Procurement will look a little different in the New Year. We're moving a few things around to make it easier for you to locate and access the *Advanced Search* feature, which offers a cleaner search interface, filtering options on product flags, and links to peer-reviewed papers. Once the changes go live in January 2023, links to *Advanced Search* and *All Punchouts* will appear more prominently on the Oracle Procurement homepage and the standard search bar will be removed. After launch, you will need to click on one of these search options to initiate a search: *Advanced Search* or *All Punchouts*. Stay tuned for more updates in 2023!

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 having an open Q&A. Come and get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don't miss it!

Have Finance-related questions?
Call the UC San Diego Finance Help Line.

(858) 246-4237 **Tuesdays - Thursdays | 10:00am - 12:00pm & 1:00pm - 3:00pm**

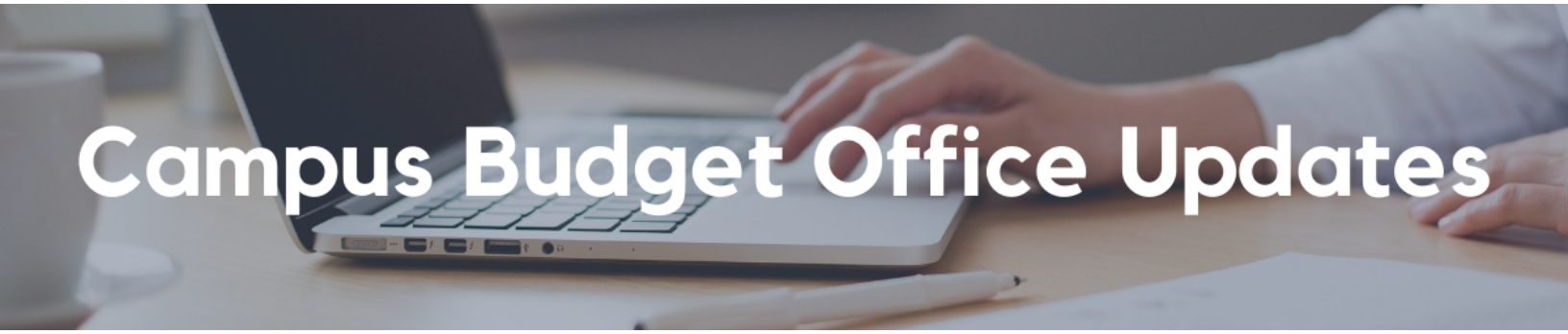
Holiday Closure Notification: UC San Diego (excluding the hospitals and clinics) will be officially closed between Friday, December 23, 2022 and Monday, January 2, 2023. This closure will result in significant energy savings from reduced operations. The BFS Finance Help Desk Line Agents will return to the office on January 3, 2023.

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 Report Release: Department Exceptions
PPM Closed Projects with GL Balances: This report displays projects that have been closed in PPM but still have a balance on one or more general ledger accounts. This report includes balance sheet accounts (liabilities, accounts receivable, etc.).

Thank You for Your Support in 2022!

Thank you for working with the Business Intelligence and Financial Reporting team this year. Your enhancement requests, your ideas, and your feedback have all made the dashboards and reports we're producing even better. We are looking forward to what next year will bring, including keeping our Dashboard of the Week series going. If you were able to join us for the series, please consider completing a short survey to help us prepare for next year's offering. See you in 2023!



FY24 Budget Cycle Begins in the New Year

The FY24 budget cycle will kick-off after the holidays. Watch for more communications with important training registration information, Oracle Planning and Budgeting system go-live, key deadlines for budget development and support resources.

On behalf of the Campus Budget Office, happy holidays!

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 resolve Travel & Entertainment (T&E) Card Declines

If you are ever in a situation where you are trying to use your T&E Card for a travel or entertainment related purchase and your purchase is declined, please submit a Services & Support case. Please make sure to choose the categories on the screenshot below. In the "Subject" section, please include detailed information as to what you were purchasing when the card was declined, as well as the merchant name. We will troubleshoot the issue and will either set up the applicable merchant code on the account, or advise you on how to proceed with the transaction.

*I want to...

Ask a Question or Make a Request

*About

Banking, Cash & Card Products

*Related to...

Travel & Entertainment Card

*More Specifically...

Travel & Entertainment Card MCC

The Support Framework: Your Guide to Finding Help

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

Holiday Closure Notification: UC San Diego (excluding the hospitals and clinics) will be officially closed between Friday, December 23, 2022 and Monday, January 2, 2023. This closure will result in significant energy savings from reduced operations. Due to the closure, all Services & Support tickets will be reviewed and answered after Jan 3rd.

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

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