Budget & Finance Weekly Digest

August 17, 2021 | 33rd Edition

Announcements

New Independent Contractor Form

A new Independent Contractor Form has been launched for hiring Independent Contractors! UC San Diego is aligning with UC Office of the President documentation to make the hiring of an independent contractor easier. Using this form helps reduce inconsistency in applying California laws, IRS governance, and UC policies all in one location. The new form and instructions are available on the Independent Contractor/Consultant Blink page.

What's to know about Business & Financial Services (BFS)?

Curious about what we do? Check out Business and Financial Services' new About Us section in Blink! Meet the BFS core leadership team, understand the mission, find key partners, and learn about ongoing initiatives all in one consolidated section. We look forward to rolling out more updates as we continue working on the Budget & Finance CMS Redesign!

Install the WalkMe Browser Extension!

The WalkMe Browser Extension adds various tips, walkthroughs, and resources to your Oracle and Concur applications. We also use WalkMe to add additional validation to your transactions, announcements, and reminders. Download the extension to your browser to unlock these features.

On July 13, 2021, a WalkMe build was implemented in Oracle Procurement which validates whether or not POET information has been populated when a project has been referenced in the chart string. If POET information is not populated in those circumstances, there are numerous downstream effects and corrective actions (e.g. cost transfers, PO replacement, change orders) required both of the department and IPPS.

With the implementation of the POET validation, there were 307 incorrect transactions caught and corrected before they were submitted. With current WalkMe adoption, however, only about 20% of all transactions are undergoing this validation. We encourage you to download the WalkMe extension to improve the effect these enhancements can have on your procure-to-pay experience.

Research Administration Training Program Level 1: The Basics

Tuesday, August 24 @ 9:00am - 11:00am & 1:00pm - 3:00pm

We are pleased to cross-promote the re-launch of the Research Administration Training Program! The Basics is the first level in a **four-part** assessment-based certificate series. This course is designed to provide you (research administrators/faculty fund managers) with both the theory and practical application of concepts you will deal with on a regular basis. The first two modules will debut on August 24. Click here for the full program schedule.

Fund Management Office Hours

Thursdays @ 11:00am - 12:00pm

What is your department doing for ledger review and reconciliation? Come to this week's office hours on August 19 prepared to talk about what reports you are using for

ledger review, how you are determining which transactions to focus your review on, and what questions you are trying to answer in your review.

In next week's Fund Management Office Hours on August 26, we will focus on answering your questions about lifting commitments. Attend the IPPS Hot Topics the day before on Lifting Commitments in Oracle Procurement & Payables for a general how-to, and then bring your specific commitment examples that you need to lift to these office hours. Ashlyn Bernal will host and walk you through your examples step by step.

Hot Topics: Lifting Commitments in Oracle Procurement & Payables

Wednesday, August 25, 2021 @ 11:00am - 12:00pm

Join the IPPS Team for the next session of Hot Topics! This session will focus on lifting commitments associated with requisitions, purchase orders, and invoices (e.g. Closing POs). Our instructor will walk through the system steps live and show how to best utilize reports. There will be a chance to participate in Q&A at the end.

Want more information on lifting commitments? Attend the Fund Management Office Hours on Thursday, August 26 @ 11:00 am to walk through your own specific examples.

UC San Diego Travel: Before You Go

Thursday, August 26, 2021 @ 9:00am - 11:00am

Faculty and staff who travel or book business travel can further their understanding of preauthorization, booking travel via Concur, prepaying with the Travel & Entertainment Card, and how to take advantage of TripIt Pro.

UC San Diego Travel: Reporting Expenses

Thursday, August 26, 2021 @ 1:00pm - 3:00pm

The course provides an overview of UC San Diego travel policy and procedure, including summarized guidelines, resources, and information about online tools. In this course, you will learn about Concur processes for prepaying travel and claiming expenses after the business trip occurs.

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!

Essential Ordering Tips

As POs close automatically once its particular criteria has been reached, based on either amount or quantity depending on the ordering method, it is important to set up the PO correctly to prevent early PO closure. Review our Overview of Request Forms KBA for tips on determining whether you are placing a quantity or amount-based requisition. Additionally, please refer to the below tips for proper order placement.

- When using a quantity-based request form, do not group line items together:
  - Only use a quantity of “1” when you are ordering “1” item
  - Follow the quote provided to you by the supplier as that should match the way the supplier invoices UC San Diego
- If you want to group line items together, you may do so in an amount-based request form:
  - Do not group taxable and non-taxable items together
  - Reference the quote in your line item description

Ordering from Praxair and Airgas

When purchasing commodities such as dry ice and liquid nitrogen from these suppliers, keep in mind the following tips:

- Dry Ice and Liquid Nitrogen orders require a DIRECT Ship-To address in Oracle (e.g. Leichtag-Direct instead of Leichtag-Preferred)
- Search “Praxair Dry Ice” or “Airgas Liquid Nitrogen” for best results when placing 1x orders
- Please use the Goods – Multiple Shipments form when submitting recurring orders for Dry Ice and/or Liquid Nitrogen
- The Description field can be used to notate quantity, frequency of delivery, preferred delivery day, and other necessary information
- The Amount field can be used to notate the full dollar amount over the period of time covered by the Purchase Order
- Praxair is rolling out a Procurement Card program for UC San Diego Dry Ice customers, with more information to come soon!

- Contact Praxair Dry Ice directly to switch to Procurement Card now at Alicia.Alvarez@linde.com or 800-266-4369, x26196
- Have your Praxair account number handy. The 8-digit number can be found on your dry ice delivery slip

Car Rentals in Concur

Although we encourage personal travel to be booked in Concur, the one exception is rental cars. The rates for personal bookings are the same as for business bookings, but the business-related insurance is not included.

Renting a car in Concur will automatically include UC's insurance and contracted rates for business travelers. Travelers may be asked to provide UC identification at the time of pick-up to ensure the car is for a verified business purpose.

The way to rent a car for personal travel is to open *Company Notes* from your Concur home page. Click on *Connexxus Resources*, select your campus, and sign in with Single Sign-On. When you enter the Connexxus portal, navigate to the *Personal Travel* tile and select your rental agency of choice.

A Return to Travel and Events

Is your Travel & Entertainment Card ready to use?

As we return to business travel and events, it is important to make sure that you have your Travel & Entertainment (T&E) Card ready to use for your next trip or event. For existing cardholders, please ensure that you have received and activated your T&E Card.

You can confirm that you have the correct card by looking in the upper-left corner of your card and verifying that it has the rebranded name: **UC San Diego Travel & Entertainment**. If you previously held a Travel Card and have not received your new T&E Card, please contact IPPS via Services & Support (*Related to: Travel & Entertainment Card) for assistance with getting a replacement card.

T&E Card applicants may submit their New Card Request via Concur. Should you need the card mailed to a different address, please follow the instructions provided in this KBA.

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.

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UC San Diego

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