April 27th, 2021 - 17th Edition
Budget & Finance Weekly Digest

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Providing Difficult Financial Decisions

The Financial Management Services (FMS) team is here to assist you during your financial planning. To improve your decision-making capabilities, consider the following strategies:

1. **Evaluate the Cost-Benefit Ratio:** Before making any significant financial decision, calculate the potential benefits against the costs involved. This will help you understand whether the decision is worth the investment.
2. **Seek External Advice:** Financial advisors can provide valuable insights and perspective. They can help you weigh the pros and cons of different options and make informed decisions.
3. **Consider the Impact on All Stakeholders:** Financial decisions often have implications beyond the immediate parties involved. Consider the effects on employees, customers, and investors.

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Tips & Tricks

- **Constraints:** When planning for future expenses, it’s crucial to be aware of any constraints or limitations. This includes budget limitations, regulatory requirements, and organizational policies.

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Lift PO Commitments in Oracle Procurement

If you are noticing PO commitments on your PPM ledger, you may lift them by following these steps:

1. **Locate the PO:** Navigate to the Oracle Procurement system and find the specific PO that requires lifting.
2. **Access the PO Details:** Once located, open the PO to view its details.
3. **Lift the Commitment:** Within the PO details, look for the option to lift commitments. Follow the system prompts to confirm the lifting action.

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Concur Live Training Courses

Register for an upcoming training class or event to enhance your knowledge and skills:

- **Hot Topics: Profile Setup & Management**
  - **Wednesday, April 28, 2021 @ 11:00am - 12:00pm**
  - Explore best practices for setting up and managing Concur profiles.
- **Oracle Inquiry Role Update**
  - **Tuesday, May 11, 2021 @ 9:00am - 11:00am**
  - Learn about the latest updates to Oracle Inquiry roles.

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Oracle Procurement & Field Financial Reporting

- **UCLC Cautions:** Oracle Procurement is committed to maintaining and sharing progress, and the best way to do that is through the UCLC Learning Center.
- **Strategic Conclusions:** The team will go over the process for expanding privileges and the importance of profile setup and management as it relates to Concur and financial reporting.

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Hot Topics: Profile Setup & Management

- Explore best practices for setting up and managing Concur profiles.
- Learn about the latest updates to Oracle Inquiry roles.

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Delegates KBA

- **New KBA has been published outlining the guidelines to adjust your delegates KBA.**

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Oracle Procurement & Financial Reporting

- **Field Financial Reporting:** You can now view your financial reporting data in Oracle Procurement.
- **Expand Privileges:** With the expanded privileges, please remember that UC San Diego is committed to maintaining and sharing progress. If you have any questions, feel free to reach out to the team.

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Promotions of University Procurement Card Program

The University Procurement Card Program is undergoing changes to improve its offerings. The team will go over the process for promoting delegates and get familiar with the new look and feel!

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University Procurement Card Program

The course will include more in-depth explanations of changes to the University Procurement Card Program. The team will go over the process for promoting delegates.

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Concur Best Practices

- **New BI Author Course in UC Learning!**
  - **Tuesday, May 11, 2021 @ 11:00am - 12:00pm**
  - Take a deeper dive into new BI Author Course in UC Learning. You can watch the Fund Management training series.

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Financials Cloud

- **New BI Author Course in UC Learning!**
  - Learn the basics of how to create an analysis from scratch; basic financials cloud.

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