

# Budget & Finance Weekly Digest

October 11, 2022 | 92nd Edition

## Announcements



### Oracle Cloud Scheduled Maintenance

Oracle production environment will be down for maintenance on **Friday, October 14, 2022** from **7:00pm** through **12:00am**.

### Logistics Portal Enhancement – POETAF Validation

The Logistics Request Form, available within the Logistics Portal, now has built-in POETAF validation. The enhancement eliminates accounting errors that may occur if a requester skips the POETAF validation step or provides an invalid POETAF string. The link to the external POETAF checker has been removed from the Logistics Request Form as it is no longer needed. Clients now have the assurance that the project and task, and funding source (if applicable), will be validated before the form is submitted. For more information about this update, please refer to the [Logistics Request Form - POETAF Validator](#) KBA. The Logistics team can be reached via [Services & Support](#) should you have additional questions.



**Reminder!**

**Financial Accounting Program: Upcoming Information Sessions**

We invite you to hear more about the [Financial Accounting Program](#) by attending an upcoming **Information Session** for the following dates. Please register using links below:

- [Tuesday, October 25, 2022 @ 10:00am - 11:00am](#)
- [Thursday, October 27, 2022 @ 2:30pm - 3:30pm](#)

**We encourage you** to share this information with your teams, colleagues, and those who may be interested in participating in the Financial Accounting Program. We appreciate the partnership with UC San Diego Division of Extended Studies and the support from supervisors across campus.

### **Oracle Tax Engine Update**

The tax engine associated with the Accounts Payable Invoices module has been updated to calculate tax separately at the state, county, city, and district level. You may notice in your ledgers as a result that there are more tax lines than you are used to. As a tip, to see the full tax amount try downloading the transactions to Excel and consolidating the tax lines.

### **IPPS Hot Topics**

In case you missed it, you can review our latest Hot Topics session about the travel landscape and benefits on [YouTube](#). Don't forget to [register](#) for our upcoming session this month on recent changes to Oracle Procurement search functionality!



Watch recorded office hours and more on our [UC San Diego Budget & Finance YouTube channel](#).

### **[Internal Controls Office Hours](#)**

**Every Wednesday**

**1:00pm - 2:00pm**

Join the Internal Controls Office Hours to ask questions regarding the internal controls guidance posted on the [Best Practices in Internal Controls Blink page](#).

### **[Fund Management Office Hours](#)**

**Every Thursday**

**11:00am - 12:00pm**

This week we will have open Q&A. Bring your questions and struggles. Nothing a fund manager does is off the table. Trying to figure out the source of a GL-PPM discrepancy? Can't figure out how to get your direct retro with cap gap to work? See a wire you need to claim but have no idea what to do next? Bring your issue to office hours and phone a friend.

---

## **Oracle: Buying and Paying for Financial Unit Approvers**

**Thursday, October 13, 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.

## **Concur: Event Expenses & Other Reimbursements**

**Thursday, October 13, 2022**

**9:00am - 11:00am**

The course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. This course will be especially valuable for employees who host meetings and events and want to further their understanding of the expense reconciliation process via Concur. Also, those who previously utilized MyPayments for requesting employee reimbursements for business expenses may attend this course. Intended for preparers, meeting/event hosts, financial managers, and entertainment approvers who are familiar with Entertainment Policy BUS-79 and would like to learn about more advanced meetings and entertainment terminology and concepts.

---

## **Upcoming Travel Webinars**

**Wednesday, October 12, 2022 @ 11:00am**

Expect updates on the industry, their sustainability platform and availability of electric vehicles to UC's contract. Enterprise will upgrade FIVE winners to Emerald Club Executive. Only those in attendance will be eligible to win.

**Wednesday, October 19, 2022 @ 11:00am**

American Airlines will share information on the benefits UC travelers receive, their global network, the AAdvantage Loyalty Program and ongoing efforts in sustainability. All attendees will be entered to win ONE of the following: 10K AAdvantage Miles Certificate (2 winners); Admirals Club one day passes (4 winners); and 2 winners will get a status upgrades (winners will go up one tier from their current status up to and including Platinum).

---

## **IPPS Hot Topics: How to Search and Purchase Strategically**

**Thursday, October 27 @ 10:00am – 11:00am**

In this next IPPS Hot Topics session, learn how to best interact with our agreement suppliers as well as new search functionality in Oracle Procurement. This session will include a demo as well as Q&A.

---



# Have Finance-related questions?

## Call the UC San Diego Finance Help Line.

**( 8 5 8 ) 2 4 6 - 4 2 3 7**

**Tuesdays - Thursdays | 10:00am - 12:00pm & 1:00pm - 3:00pm**

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!*

# Tips & Tricks

## Want an easy way to manage your receipts while on the go?

There are two ways you can do that: download the SAP Concur Mobile App from the App Center once you are logged in to Concur. For more guidance on how to upload your receipt images through the mobile app, please reference the [How to Manage Receipts with the Concur Mobile App](#) KBA.

Another option is to use your email to send the receipts directly from your mobile phone to your Concur profile. You would first need to verify your email in Concur under Profile Settings. The system can associate information forwarded from that verified email address to your Concur account. To verify your email address:

1. Go to your Profile Setting and then select **Email Addresses** under the “Your Information” section.
2. You will see your work email address already listed on your profile.
3. Click the **Verify** link. This will trigger the system to send a verification email to the inbox of the address you are verifying.
4. Check your email inbox for an email from concursolutions.com with the **Subject Line: Email Verification**.
5. Open the email.
6. The email will contain a verification code specific to this email address. Copy the verification code.
7. Navigate back to **Email Addresses** section of your Travel profile.
8. You will now see a field labeled **Enter Code**. Paste the copied code into this field.
9. Under Verify click **OK**.

Once the email address has been verified, you'll be able to forward your receipts to [receipts@expenseit.com](mailto:receipts@expenseit.com) which will be uploaded into your Available Expenses. Expenseit attempts to categorize the receipt data to auto populate expenditure amounts, vendor information, and expense types.

Note that other documents (such as comparable agendas, conference agendas, supporting emails, etc.) can be emailed to [receipts@concur.com](mailto:receipts@concur.com) and they will appear as images under Available Receipts.

## The Support Framework: Your Guide to Finding Help

Learning all there is to know about budget & finance can 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](mailto: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  
BUDGET AND FINANCE 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.

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](#)

[Manage](#) your preferences | [Opt Out](#) using TrueRemove™  
Got this as a forward? [Sign up](#) to receive our future emails.  
View this email [online](#).

9500 Gilman Dr, | La Jolla, CA 92093 US

This email was sent to .  
*To continue receiving our emails, add us to your address book.*

[Subscribe](#) to our email list.