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.



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.

(858) 246-4237 **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!



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 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 airfare, conference agendas, supporting emails, etc.) can be emailed to 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.



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

UC San Diego

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.