

August 3, 2021 | 31st Edition



Action Required: Graduate Student Stipends and Fees Correction
We urgently need your help to correct the fund sources used for FY2021 stipend and fee payments. PIs and financial managers are expecting to see these changes with the August ledger close. The changes must now be submitted by graduate department/program coordinators by August 13. Read the full article here.

Click to view all known transitional issues impacting financial processes and reports. This list was curated specifically to support financial review and corrective actions by department fund manager.



Oracle Procurement: Buying Research and Inventorial Equipment
Tuesday, August 10 & Thursday, August 12, 2021 @ 8:30am - 9:15am
This training webinar consists of a 30-minute presentation followed by a Q&A session. Session provides an overview of a new feature in Oracle Procurement that is now available to Shoppers. Shoppers must select the “Inventorial

Equipment" check box for each line item that is defined as inventorial equipment. Register for the training webinar here.

Oracle: Buying and Paying for PO Requisitioners

Thursday, August 5, 2021 @ 9:00am - 11:00am

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, closing POs, processing nonPO payments, and checking invoice status. This course will be especially valuable for individuals responsible for departmental purchases who want to further their understanding of buying on campus.

Please note the Introduction to Oracle Procurement & Payables eCourse is a required prerequisite for registration.

Concur: Event and Expense Reimbursements

Tuesday, August 10, 2021 @ 9:00am - 11:00am

This live course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. Intended for preparers, hosts/payees, and financial managers who are familiar with policy and would like to learn about the expense reconciliation process in Concur.

University Procurement Card Program

Tuesday, August 10, 2021 @ 1:30pm - 4:00pm

Current and prospective cardholders will learn about updates to the card program, common uses, and the Concur processes for both Procurement Card request and transaction reconciliation.

Note that this is not an introductory course. Participants should first complete the associated eCourse available through the UC Learning Center.

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!



Enhancement Alert - Search by Description
You can now search your expenditure types by description! Need help finding which account number to use? **UCSD-DSH Project Information Lookup** offers the Expenditure Type Lookup report with a new description search. Simply type in the words you want to search for (*note: this is not case sensitive*), click apply, and voila! Happy reporting!



Supervisor Approvers
Departments have the option of adding the appropriate Supervisor Approver to the employee payee's Concur profile in accordance with any of their internal/department policies. Before assigning Supervisor Approvers in Concur, please review what role a Supervisor Approver has within Concur. Information can be found in the Concur Approvals Overview page. Using a Supervisor Approver requires coordination and communication within a department in order to prevent any confusion or delays with Requests and Expense Reports. Please consult within your department before using this feature.

Updated - KB0032695: How to Request a Concur Approver Role
Review the updated KBA regarding Oracle and Concur Role Requests and instructions on how to request access for authorized individuals to review and approve expenses and documents in Concur.

Invoice Tolerances Published on Blink
Oracle matches invoice values to purchase order values and places an invoice on hold or advances the invoice to approval workflow or payment based on certain criteria. These tolerance levels have been updated on Blink.



About the Weekly Digest

Each Tuesday important updates related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense, are delivered to your inbox. Our goal is to deliver timely information that matters to you.

Contact Us! Have questions about this edition? The best way to contact our team is via Services & Support.

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial information system and support departments' success in managing their fiscal responsibilities.
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