Announcements

Update: Oracle Procurement & Payables eCourse...
On Wednesday, August 4, 2021, we are releasing an updated KBA regarding Oracle and Concur Role Requests and approvals.

Tip: Using a Supervisor Approver...
Use a Supervisor Approver, which is a designated supervisor for the department, in the Concur system to ensure prompt approval of expense reports. This will help avoid delays and ensure that expenses are processed in a timely manner.

About the Weekly Digest
Each Tuesday important updates related to Budget & Finance and related topics are shared. Check this edition for the latest news and updates related to your fiscal responsibilities.

Have questions about this edition?
The best way to contact our team is via email. Our team is here to provide timely information that matters to you.

About UC San Diego, Budget & Finance
The UC San Diego Budget & Finance department is committed to supporting the mission of the university by ensuring financial resources are used wisely and effectively. We provide guidance and support to departments in managing their fiscal responsibilities, which includes procurement, payables, and financial reporting.

Support
University of California San Diego, 9500 Gilman Drive, La Jolla, CA, 92093
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Information systems and support departments' success in managing their fiscal responsibilities.

Oracle Procurement: Budget Research and Invoicing Support
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. The presentation provides an overview of the Oracle Procurement and Payables (P&Ac) system, which allows for efficient and accurate processing of invoices. The webinar will cover the process for processing invoices, including the use of P&Ac, and will provide examples of common issues and solutions.

Enhancement Alert - Search by Description
You can now search your expenditure types by description to quickly find what you need! This feature is available through the Oracle Procurement & Payables eCourse. It offers the Expenditure Type Lookup report with a new description search.

Supervisor Approver
Departments have the option of adding the appropriate Supervisor Approver to their Concur system to ensure prompt approval of expense reports.

Tips & Tracks

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. Participants will learn how to effectively manage requisition processes, including purchase orders and invoices. The course will cover topics such as searching requisitions, requisitioning goods and services, and managing purchase orders.

Oracle Procurement: Buying Research and Inventorial Equipment
Tuesday, August 10 & Thursday, August 12, 2021 @ 8:30am - 9:15am
This training webinar offers a hands-on demonstration of the Oracle Procurement and Payables (P&Ac) system, which is now available to Shoppers. Participants will learn how to use the P&Ac system to extract data and retrieve information.

Concur Approvals Overview
Tuesday, August 10, 2021 @ 9:00am - 11:00am
This course is intended for departmental financial managers who are responsible for approving expenses and documents in Concur. Participants will learn how to request access for authorized individuals to review and approve expense reports.

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.

This live course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. Participants will learn how to use Concur to manage budget, track expenses, and comply with policy and would like to learn about the expense reconciliation process in Concur.

Please note the following dates for the UC Learning Center courses.

Concur Approver Role Request:
Updated - KB0032695: How to Request a Concur Approver Role
The updated KBA regarding Oracle and Concur Role Requests and approvals is now available through the UC Learning Center.

Concur: Event and Expense Reimbursements
Tuesday, August 10, 2021 @ 9:00am - 11:00am
This course includes hands-on instruction on the use of Concur. Participants will learn how to effectively manage events and expense reimbursements, including the use of event calendars and the Concur processes for both Procurement Card and reimbursement.

For more information about this edition, please review the August 3, 2021, Budget & Finance Weekly Digest. Click to view all.

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Experiential Learning - Finding Descriptions
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Tips & Tracks

Superintendent Approvers
Departments have the option of adding the appropriate Superintendent Approver to the Concur system to ensure prompt approval of expense reports.

Enter your search terms, type in the words you want to search for (e.g., "research"), click apply, and voila! Happy reporting!