Learning all there is to know about budget & finance can feel daunting. The Support Framework: Your Guide to Finding Help

the go. Check out how to submit a Delegation of Authority request on your behalf. Once you have submitted a Delegation of Authority Request in Concur, it will allow ANY of your delegates to go in and change their expenses. Remember that you have the power to submit a Delegation of Authority Request in Concur so someone else can reconcile on your behalf.

Procurement Card Holders

Questions?

Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer your questions.

Log in to UC Learning with your SSO and click on the links above to take you directly to the course details and registration.

Camp IPPS

Join IPPS for a bit of camp-themed fun before starting the 'in-tents' training week ahead.

9:00am - 11:00am

Monday, August 15, 2022

Please note the general introduction for understanding the best practices, responsibility for approving requisitions and invoices on behalf of their financial unit. This course will be especially valuable for individuals responsible for those tasks such as reviewing and populating POETAF information during the ordering process, approving requisitions and invoices, revising orders, and checking PO invoice status.

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as creating requisitions, sourcing, shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, closing POs, and processing nonPO payments, and checking invoice status. This course will be especially valuable for individuals responsible for those tasks.

Thursday, August 11, 2022

Friday, August 5, 2022

Oracle: Buying and Paying for Financial Unit Approvers

Use this course to learn about the Oracle Fiscal Approval process. This course is specifically designed for those responsible for approving requisitions and invoices on behalf of their financial unit. This course will be especially valuable for individuals responsible for those tasks such as reviewing and populating POETAF information during the ordering process, approving requisitions and invoices, revising orders, and checking PO invoice status.

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as creating requisitions, sourcing, shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, closing POs, and processing nonPO payments, and checking invoice status. This course will be especially valuable for individuals responsible for those tasks.

This course reoccurs on 09/13, 10/11, 11/08.

10:00am - 11:00am

Wednesday, August 3, 2022

Join Jamie Wheat and the Equipment Asset Management team for office hours this week to discuss the ins and outs of life-cycle maintenance. We will be covering topics such as how to set up equipment, review the equipment's history, and how to manage the equipment's maintenance. There will be time for Q&A on this topic, and if time permits, an open Q&A for other topics.

Friday, October 7, 2022

Get a head start on how recent and future report development fits into an overall big picture for fund manager reporting. There will be time for Q&A on this topic, and if time permits, an open Q&A for other topics.

A lot of new reports have been released in the past few months, and it can sometimes feel overwhelming to know which report to use for what. At this week's office hours, Heather Sears will review the landscape of financial reporting and discuss how the reports are designed to help fund managers make informed decisions.

The complete landscape of financial reporting can feel overwhelming at times, especially when considering how recent and future report development fits into an overall big picture for fund manager reporting. There will be time for Q&A on this topic, and if time permits, an open Q&A for other topics.

Oracle: Buying and Paying for PO Requisitioners

This course is designed for those responsible for creating requisitions. It will cover topics such as creating requisitions, sourcing, shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, closing POs, and processing nonPO payments, and checking invoice status. This course will be especially valuable for individuals responsible for those tasks.

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as creating requisitions, sourcing, shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, closing POs, and processing nonPO payments, and checking invoice status. This course will be especially valuable for individuals responsible for those tasks.

This course reoccurs on 09/13, 10/11, 11/08.

11:00am - 12:00pm

Camp-themed photo booth and snack station

Meet your Camp Counselors (course instructors/presenters)

8:30am - 9:30am

Thursday, August 4, 2022

How to get your financial reports

This week's office hours are dedicated to understanding how to get your financial reports. We will cover topics such as how to set up your report to use for what, how to navigate the financial reporting tool, and how to use the various filters and sorting options to get the information you need. There will be time for Q&A on this topic, and if time permits, an open Q&A for other topics.

Friday, October 7, 2022

Understanding IDC

This week's office hours are dedicated to understanding IDC. We will cover topics such as how IDC is usually assessed for cost sharing as a project cost, but is not a cost to the department (net $0 financial impact to the department). For awards setup with Internal Funding Source(s), there will no longer be the 538000 – Internal CostSharing IDC expenditure type and SPF will no longer need to assign an internal burden schedule to the cost sharing project/task. The current exception report for 538000 on Non-Sponsored Funds from UCSD-DSH Department Exceptions Panorama will always net to $0.

For awards with Internal IDC, the burden schedules will be assessed with the same expenditure type of 538000 – FandA IDC - Expense, but the Internal Funding expenditure will be assessed with the same expenditure type. If the internal IDC is usually assessed for cost sharing as a project cost, but is not a cost to the department (net $0 financial impact to the department), the Internal IDC will be assessed with the same expenditure type. If the internal IDC is usually assessed for cost sharing as a project cost, but is not a cost to the department (net $0 financial impact to the department), the Internal IDC will be assessed with the same expenditure type. If the internal IDC is usually assessed for cost sharing as a project cost, but is not a cost to the department (net $0 financial impact to the department), the Internal IDC will be assessed with the same expenditure type. If the internal IDC is usually assessed for cost sharing as a project cost, but is not a cost to the department (net $0 financial impact to the department), the Internal IDC will be assessed with the same expenditure type.

We have worked with Oracle to use only the Internal Funding Source to drive this instead of separate internal IDC and burden schedules.

FYI Purchase Order Implemented

FYI Requisition Approved

Journals

Accounts Payable Invoices and Invoice Holds

Contracts

Requisitions, Purchase Orders, and Change Orders

Due to limited functionality, the following notifications cannot be updated at this time:

- IDC
- Business Credit Card
- Customer Credit Card
- Traveler's Legal ID

We will release an outline of the detailed changes for the following notifications being updated in preparation for the release date on August 29, 2022. We will release a list of notifications that cannot be updated at this time to allow you to take advantage of the ability to approve your transactions via email. Over the next few weeks, we will release an outline of the detailed changes for the following notifications being updated in preparation for the release date on August 29, 2022. We will release a list of notifications that cannot be updated at this time to allow you to take advantage of the ability to approve your transactions via email.

Over the past several months we have been working on updating the Oracle Workflow Notifications with more detailed information to allow you to take advantage of the ability to approve your transactions via email. Over the next few weeks, we will release an outline of the detailed changes for the following notifications being updated in preparation for the release date on August 29, 2022. We will release a list of notifications that cannot be updated at this time to allow you to take advantage of the ability to approve your transactions via email.

We have worked with Oracle to use only the Internal Funding Source to drive this instead of separate internal IDC and burden schedules.

The complete landscape of financial reporting can feel overwhelming at times, especially when considering how recent and future report development fits into an overall big picture for fund manager reporting. There will be time for Q&A on this topic, and if time permits, an open Q&A for other topics.

A lot of new reports have been released in the past few months, and it can sometimes feel overwhelming to know which report to use for what. At this week's office hours, Heather Sears will review the landscape of financial reporting and discuss how the reports are designed to help fund managers make informed decisions.

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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™

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