Budget & Finance Weekly Digest

August 2, 2022 | 82nd Edition

Announcements

Oracle Workflow Notification Updates Coming 08/29/2022

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 of August 29, 2022**:

- Accounts Payable Invoices and Invoice Holds
- Contract Invoices
- Journals
- Requisitions, Purchase Orders, and Change Orders
- Project Budgets (Financial Plans)

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

- Contracts
- FYI Requisition Approved
- FYI Purchase Order Implemented
- Project Cost Adjustments

Stay tuned for more information!

We Want Your Feedback!

We welcome you to complete a quick survey on how the Fiscal Close Bulletin went for you. The survey will close on **Friday, August 12**.

Complete the Survey

Change in Internal Funding Source Burdening / IDC

Previously, separate tasks or projects had to be created for cost sharing to drive the Internal IDC (indirect costs) assessment. 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 project/department). This has caused a number of impacts to departments for their reconciliation, SPF for setup and ITS for maintenance. We have worked with Oracle to use only the Internal Funding Source to drive this instead of separate internal burden schedules.

For **new** 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 internal IDC will be assessed with the same expenditure type of 538000 – FandA IDC - Expense, but the Internal Funding Source, based on the cost Funding Source, will ensure that the financial impact to the department is $0 for the IDC. Current awards will not be changed and will work the same as before, but if you want to adjust current awards, please work with your SPF Accountant.

The current exception report for 538000 on Non-Sponsored Funds from UCSD-DSH Department Exceptions Panorama should still be managed to cleanup existing awards, but this will not be impactful going forward as it will no longer matter the specific task/project you charge to, but instead the internal funding source of the cost will drive the expenses and the internal IDC will always net to $0.

For more information, please review the PPM Department Guide to Managing Cost Sharing.

Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel.

Internal Controls Office Hours
Every Monday
11:00am - 12:00pm
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
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 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.

Equipment Asset Management Office Hours
Wednesday, August 3, 2022
8:30am - 9:30am
Join Jamie Wheat and the Equipment Asset Management team for office hours this week to discuss the ins and outs of life-cycle management.

Oracle: Buying and Paying for PO Requisitioners
Thursday, August 4, 2022
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.

PPM Contract and Invoice Training
Tuesday, August 9, 2022
10:00am - 11:00am
Register for next week's comprehensive training course providing instruction on contract, event, and invoice creation and requirements. This virtual training is set to occur every 2nd Tuesday of the month at 10am. The next session is 08/09, and will reoccur on 09/13, 10/11, 11/08.

Use this link to register for the next webinar on 08/09 at 10:00am.

Oracle: Buying and Paying for Financial Unit Approvers
Thursday, August 11, 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.

Camp IPPS Open House
Monday, August 15, 2022
9:00am - 11:00am
Join IPPS for a bit of camp-themed fun before starting the 'in-tents' training week ahead.

- Meet your Camp Counselors (course instructors/presenters)
- Camp-themed photo booth and snack station

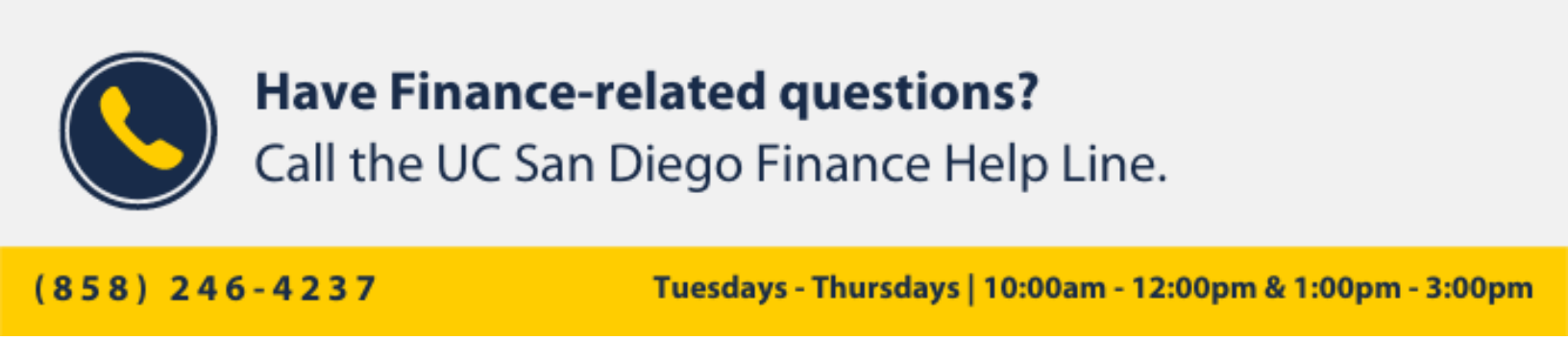
- Opportunity Drawings
- Giveaways
- and more...

Register for Camp IPPS Open House and check in at the event for a chance to win a prize!

Camp IPPS
August 15-19, 2022
There's more to Camp IPPS than 'in-tents' Oracle and Concur training. Register for these courses to discover something new about IPPS and expand your horizons.

- Competitive Bids at UC San Diego
- Navigating the Logistics Portal
- Small Business Programs & Policy
- Sustainable Program & Policy
- The World of Surplus Transfer Requests
- Thermo Fisher Scientific and UC San Diego

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



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!

New Concur Functionality: Name Edit Capability
Travelers can now self-manage the name that passes on to travel bookings!

- If a preferred name in Concur does not match the traveler's legal ID, that information can now be updated in Concur > Profile Settings > Personal Information.
- Changes update in real time so there is no delay in making travel arrangements using the name that matches the traveler's legal ID.
- If a traveler takes no action, the name that appears on booked tickets will be the preferred name from UCPath.

Procurement Card Holders

Hello Procurement Card Cardholders, are you tired of getting reminders to reconcile your outstanding expenses? This is your reminder that you have the power to submit a Delegation of Authority Request in Concur so someone else can reconcile on your behalf. Once you have submitted a Delegation of Authority Request in Concur, it will allow ANY of your delegates to go in to create **AND submit** your expense reports. This is a feature made just for those cardholders who are busy and always on the go. Check out how to submit a Delegation of Authority request here!

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
- 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 BUSINESS AND FINANCIAL 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

UC San Diego

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