Budget & Finance Weekly Digest

September 13, 2022 | 88th Edition

Announcements

Oracle Cloud Scheduled Maintenance on September 16

Oracle production environment will be down for maintenance from **Friday, September 16, 2022 @ 7:00pm** through **Sunday, September 18, 2022 @ 7:00pm**.

Oracle Update Coming Soon

An Oracle enhancement that will streamline the requisition approval process is slated to launch later this month. The new process will auto-generate a PO before routing it to the appropriate professional buyer for review. This minor change to the approval workflow will allow buyers to access and review more than one request at a time, allowing them to work through requisitions more quickly. Once the enhancement launches, departments should take note that the generation of PO number will not necessarily mean it has been sent to the supplier. Closer to the launch date, screenshots will be provided to guide campus through this process.

Announcing New Agreement Supplier Anixter

Locking Hardware, Access Control and Cabling Network products can be found in the new Anixter Punchout in Oracle Procurement! Access it in Oracle by going to *Procure to Pay > Purchase Requisitions > Top Categories > All Punchouts > Anixter*

Highlights:

- Contracted UC pricing is displayed, deeper discounts apply in Locking Solutions, Access Control, and Cabling & Networking categories

- Price includes shipping (charges may apply to large items)
- Two-day delivery on all in-stock items, for orders received before 3:30 pm
- Use “My Quotes” aka quote retrieval to add quoted items to your cart

Contact representatives below with questions or for quotes:

- Anixter San Diego (858) 571-6571
- Inside Sales Rep: Tony.Isaacson@anixter.com, (858) 503-7309
- Field Sales Rep: Ron.Rivers@anixter.com, (760) 212-9790

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
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.

Concur: Event & Expense Reimbursements
Thursday, September 15, 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.

Oracle: Buying and Paying for PO Requisitioners

Thursday, September 15, 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.

Financial Operations Office Hours

Friday, September 16, 2022 @ 9:00am - 10:00am

This week, the Financial Operations team will cover General Projects Contract Billing updates, Oracle 22C Version Updates, Cost Transfer error updates, the Equipment Allocation process, followed by an open Q&A. We look forward to seeing you there!

UC San Diego Travel: Before You Go

Thursday, September 22, 2022

9:00am - 11:00am

The course will include an in-depth explanation of topics covered in the Concur Travel and Expense eCourse. This course will be especially valuable for employees who travel or book business travel and want to further their understanding of travel preauthorization and UC San Diego's instance of Concur Travel booking tool. Intended for travel arrangers, delegates, travelers, and financial managers who are familiar with Travel Policy G-28 and would like to learn about more advanced Concur Travel terminology and concepts.

UC San Diego Travel: Reporting Expenses

Thursday, September 22, 2022

1:00pm - 3:00pm

This course is intended for those involved in the process of trip reconciliation for business travel at UC San Diego, including travelers, preparers (Concur Delegates) and approvers. The course provides an overview of UC San Diego travel policy and procedure, including summarized guidelines, resources, and information about online tools. In this course, you will learn about Concur processes for prepaying travel and claiming expenses after the business trip occurs in accordance with Travel Policy G-28.

Hot Topics: Travel Booking

Wednesday, September 28 @ 10:00am - 10:45am

Join IPPS for our next session of Hot Topics! Learn how to book travel the Triton way, including the benefits of booking with Concur, Balboa, and Kahala.

Upcoming Travel Webinars

Wednesday, September 14, 2022 @ 11:00am

Marriott Hotels – will share information on apartments, premier homes and luxury villas offered worldwide through Homes & Villas by Marriott, which provides fabulous options for corporate retreats, small business meetings and vacations. All

attendees will be entered to win a “Homes and Villas by Marriott” gift tote bags with water bottles (FIVE winners will be selected)

Wednesday, September 21, 2022 @ 11:00am
JetBlue Airways will focus on their growth out of Los Angeles (LAX) and the new code share partnership with American Airlines. They may also share info on the new Spirit Airlines merger. All attendees will be entered to win status upgrade to Mosaic (3 winners will be selected)

Wednesday, September 28, 2022 @ 11:00am
Hertz Car Rentals will discuss their partnership with UC on sustainability goals, plus offer updates on the car rental industry and Gold Plus program benefits. All attendees will be entered to win ONE of the following: $100 Hertz certificate (1 winner) and 4 winners will get status upgrades (winners will go up one tier from their current status up to and including President’s Circle Gold)

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**

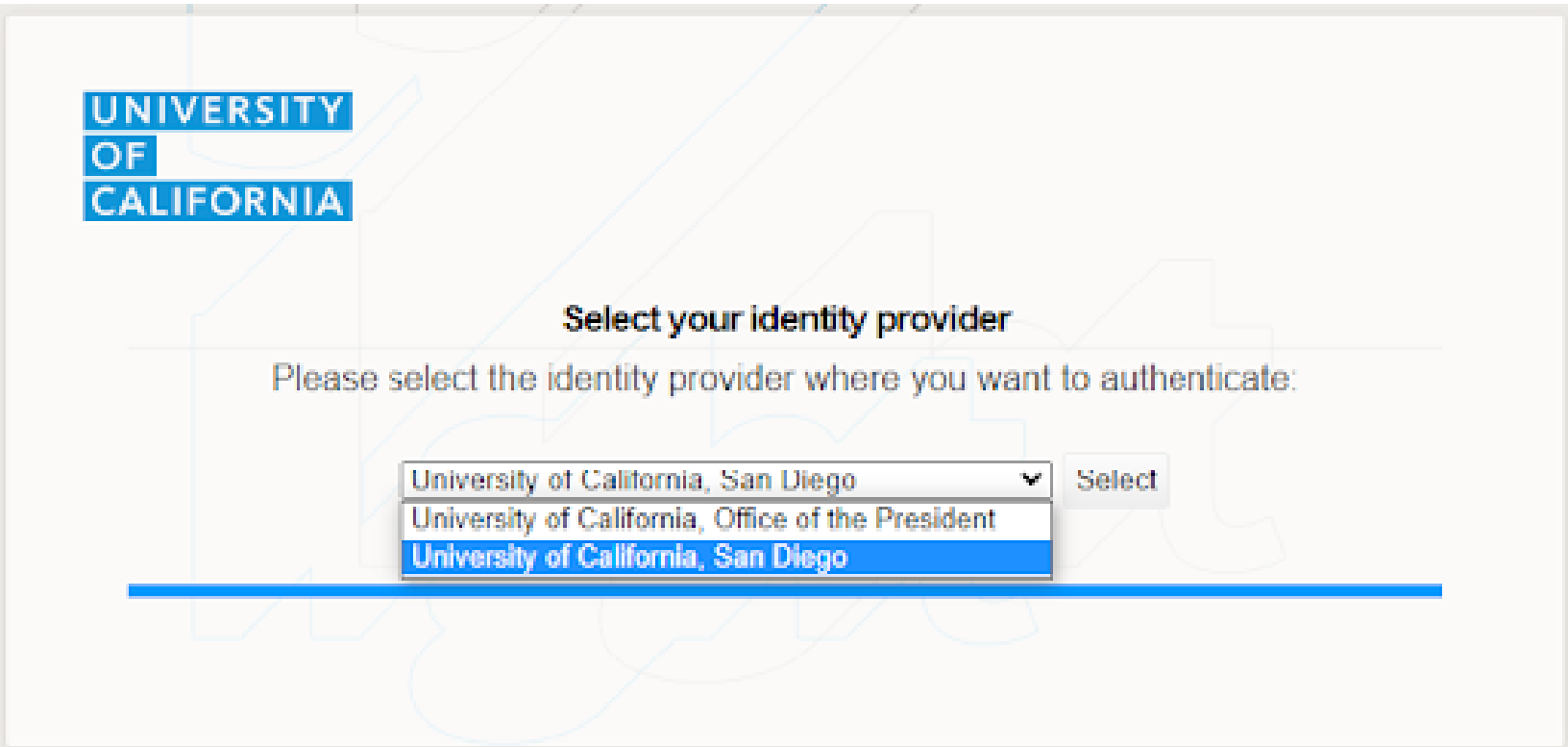
Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer Finance-related questions.

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!

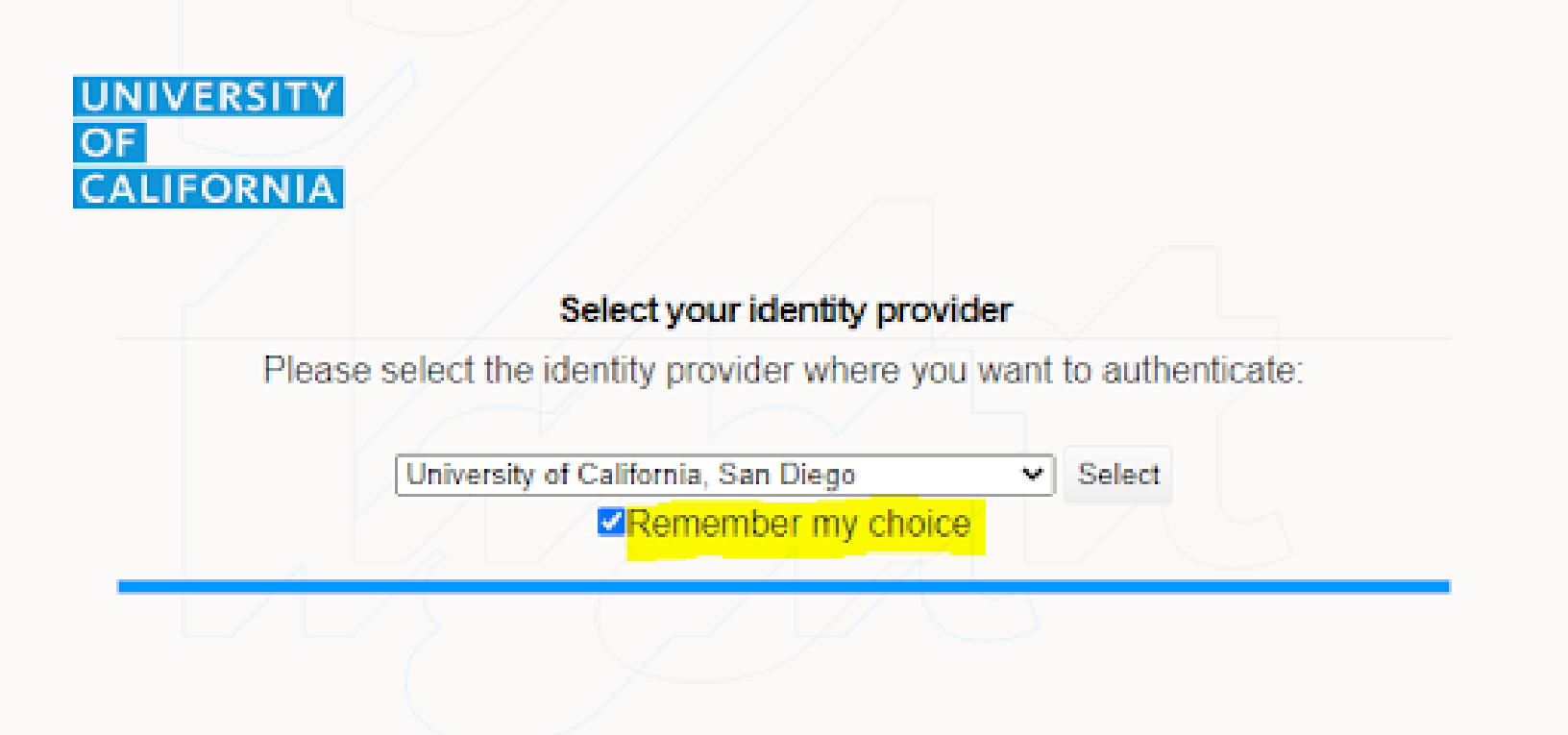
New Blink Page: Project Classifications
Based on suggestions from the Fund Management Office Hours, we have created a new table that lists Project Class Categories and Class Codes, which are now being used to determine whether PPM costs are reported as year-to-date (YTD) or inception-to-date (ITD). All projects should have an accurate Project Class Category and Code assigned, as these fields will be used more often to search for and display project information in dashboards and reports. Project Class Categories & Codes can be changed in the Project & Award Data Update Application (PADUA). Before September 27, we encourage you to take some time to review both Project Class Categories and Codes for each of your projects.

Seeing the UCOP page when you try to login to Concur?
When logging in to Concur for the very first time:

1. Make sure to select UC San Diego (not UC Office of the President) from the dropdown field:



2. Click on the "Remember My Choice" box:



If you are being redirected to the UCOP website when attempting to login to Concur:

- Clear your cookies and cache in your browser settings or try an Incognito Chrome Browser. If you are still unable to login, submit a Services & Support ticket. Do not reach out to the UCOP helpdesk.
- For more information, please review the KBA on How to Login to Concur.

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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