Questions

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

Preparers (Concur Delegates) and approvers.

Intended for: Those involved in the process of trip reconciliation for business travel at UC San Diego, including travelers, trip planners, and information about online tools.

The course provides an overview of UC San Diego travel policy and procedure, including summarized guidelines, resources, and Concur Travel terminology and concepts.

preauthorization and UC San Diego's instance of Concur Travel booking tool. Intended for travel arrangers, delegates, and information about online tools.

The course will include an in-depth explanation of topics covered in the Concur Travel and Expense eCourse. This course will provide guidance on how to best interact with our agreement suppliers as well as new search functionality in Oracle Procurement. This session will include a demo as well as Q&A.

IPPS Hot Topics: How to Search and Purchase Strategically

In this next IPPS Hot Topics session, learn how to best interact with our agreement suppliers as well as new search functionality in Oracle Procurement. This session will include a demo as well as Q&A.

We invite you to hear more about the UC San Diego Financial Accounting Program: Upcoming Information Sessions. We encourage you to attend any that may be of interest to you.

Acquisition Process, Accounts Receivable updates, FAQ and Reminders, followed by an open Q&A. We look forward to seeing you there!

Upcoming Travel Webinars

Thursday, October 27, 2022

Please select a different expenditure type.

Using the Expenditure Type field in the Financial Information Category, the user needs to select an appropriate expenditure type. Check the box if the user needs to enter an expenditure type.

Enhancement #1: Requisition Value and Expenditure Type Check

If the user clicks on Yes, then a new message appears and it prompts the user to use another expenditure type.

Enhancement #2: Inventorial Equipment Checkbox and Expenditure Type Check

If the user tries to submit a purchase requisition over $5,000, uses the inventorial equipment expenditure type 163003, and checks the inventorial equipment checkbox in the requisition, the requisition in OFC will be enhanced. The validation will now include additional checks when the inventorial equipment checkbox is checked; then a new message appears prompting the user to check the box for Inventorial Equipment.

Enhancement to Requisition Validation Process in OFC

Starting tomorrow, October 19, the following enhancements will be implemented. There will be a new tab available to answer any questions related to the new Advanced Search tool, offering an alternative to the Oracle Procurement Advanced Search. The new Advanced Search tool offers enhanced search functionality and supports keyword search capability. The new Advanced Search tool will be available on the homepage to test drive this new feature. The Advanced Search tool offers enhanced search functionality and supports keyword search capability.

View AP Invoice Billing Information

A new tab has been added to the Accounts Payable Invoices module in Oracle to show the POETAF and/or GL chart string associated with the invoice. The user can select the invoice to view the associated chart string. The user can also search for invoices by the chart string. The new Advanced Search tool offers enhanced search functionality and supports keyword search capability.

IPPS Office Hours Special Guest

During the week of October 24th, LabViva will be joining us as a special guest to support the lab community.

We appreciate the partnership with UC San Diego Division of Extended Studies and the IPPS Hot Topics and Best Practices sections of the homepage to test drive this new feature. The Advanced Search tool offers enhanced search functionality and supports keyword search capability.

Thursday, October 27, 2022

You need to claim but have no idea what to do next? Bring your issue to office hours and phone a friend.

11:00am - 12:00pm

Fund Management Office Hours

Join the Internal Controls Office Hours to ask questions regarding the internal controls guidance posted on the homepage. If you have any questions, please review the related FAQ and Reminders.

1:00pm - 2:00pm

Distribution of Charges

If the user tries to submit a purchase requisition over $5,000, uses the inventorial equipment expenditure type 163003, and checks the inventorial equipment checkbox in the requisition, the requisition in OFC will be enhanced. The validation will now include additional checks when the inventorial equipment checkbox is checked; then a new message appears prompting the user to check the box for Inventorial Equipment.

Enhancement #1: Requisition Value and Expenditure Type Check

If the user clicks on Yes, then a new message appears and it prompts the user to use another expenditure type.

Enhancement #2: Inventorial Equipment Checkbox and Expenditure Type Check

If the user tries to submit a purchase requisition under $5,000 and uses the inventorial equipment expenditure type 163003, then a new message appears and it restricts the user from continuing through the validation process, then a new message appears and it restricts the user from continuing through the validation process.

Enhancement to Requisition Validation Process in OFC

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The Support Framework: Your Guide to Finding Help

Learning all there is to know about budget & finance can feel daunting. 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™

Got this as a forward? Sign up to receive our future emails.

View this email online.

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