Questions for preparers (Concur Delegates) and approvers.

Intended for: Those involved in the process of trip reconciliation for business travel at UC San Diego, including travelers, and financial managers who are familiar with Travel Policy G-28 and would like to learn about more advanced preauthorization and UC San Diego’s instance of Concur Travel booking tool. Intended for travel arrangers, delegates, and the user is suggested to submit a ticket for support.

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 processes and systems.

9:00am - 11:00am

UC San Diego Travel: Before You Go

In this next IPPS Hot Topics session, learn how to best interact with our agreement suppliers as well as new search capability in Oracle Procure to Pay (Procure). The Purchasing office will also share information on the benefits UC travelers receive, their global network, the AAdvantage Loyalty Program and ongoing efforts in sustainability. All attendees will be entered to win ONE of the following: 10K AAdvantage Miles (2 winners); Admirals Club one day passes (4 winners); and 2 winners will get a status upgrades (winners will go from their current status to the next tier, up one tier from their current status up to and including Platinum).

Thursday, October 27

IPPS Hot Topics: How to Search and Purchase Strategically

Join the Financial Operations team this Friday to learn about General Projects Contract Billing Updates, Equipment Acquisition Process, Accounts Receivable updates, FAQ and Reminders, followed by an open Q&A. We look forward to seeing you there!

Friday, October 21, 2022

Upcoming Travel Webinars

- Every Thursday 10:00am - 11:00am: Procure to Pay and Travel & Expense Office Hours

- Every Wednesday 1:00pm - 2:00pm: Internal Controls Office Hours

- Every Thursday 1:00pm - 2:00pm: Internal Controls Office Hours

For more information, please visit the UC San Diego Budget & Finance YouTube channel.

We invite you to hear more about the Financial Accounting Program: Upcoming Information Sessions

Enhancement #1: Requisition Value and Expenditure Type Check

Starting tomorrow, October 19, the Requisition Validation Process in OFC will be enhanced. The validation will now include additional checks when the inventorial equipment expenditure type 163003 is used in a purchase requisition. This check will allow an approver to verify that the requisitioned equipment exceeds the specified maximum, as defined in the Category table. If the maximum is not met, the requisition will pass the validation process, and an approver can approve the requisition. However, if the maximum is exceeded, the requisition will be rejected, and an approver cannot approve the requisition. The validation process will also provide a detailed message to the approver, indicating the specific maximum that was exceeded.

This enhancement is designed to ensure that UC San Diego complies with its procurement policies and procedures. It is also intended to reduce the risk of unauthorized purchases, which could result in financial losses for the university. The enhancement will be retroactively applied to all requisitions, and users will be notified of the changes through a message in the requisition validation process.

Enhancement to Requisition Validation Process in OFC

We encourage you to share this information with your teams, colleagues, and those who may be interested in participating in the Financial Accounting Program.

We look forward to your continued support and thank you for your partnership in ensuring the success of our Financial Accounting Program.

Please visit the UC San Diego Budget & Finance YouTube channel for more information and to watch the video that explains this enhancement.

We invite you to try out the different calendar views in the upper right corner.

No, then a new message appears and it prompts the user to use another expenditure type.

If the user clicks No, then a new message appears and it restricts the user from continuing through the validation process, and the user will not be able to submit the requisition.

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, and the user will not be able to submit the requisition.

Enhancement #2: Inventory Information Check

This enhancement will be applied to all purchase requisitions, and users will be notified of the changes through a message in the requisition validation process.

Enhancement #3: Requisition Value and Expenditure Type Check

This enhancement is designed to ensure that UC San Diego complies with its procurement policies and procedures. It is also intended to reduce the risk of unauthorized purchases, which could result in financial losses for the university.

Enhancement to Requisition Validation Process in OFC

We encourage you to share this information with your teams, colleagues, and those who may be interested in participating in the Financial Accounting Program.

We invite you to try out the different calendar views in the upper right corner.

No, then a new message appears and it prompts the user to use another expenditure type.

If the user clicks No, then a new message appears and it restricts the user from continuing through the validation process, and the user will not be able to submit the requisition.

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, and the user will not be able to submit the requisition.

Enhancement #2: Inventory Information Check

This enhancement will be applied to all purchase requisitions, and users will be notified of the changes through a message in the requisition validation process.

Enhancement #3: Requisition Value and Expenditure Type Check

This enhancement is designed to ensure that UC San Diego complies with its procurement policies and procedures. It is also intended to reduce the risk of unauthorized purchases, which could result in financial losses for the university.

Enhancement to Requisition Validation Process in OFC

We encourage you to share this information with your teams, colleagues, and those who may be interested in participating in the Financial Accounting Program.

We invite you to try out the different calendar views in the upper right corner.

No, then a new message appears and it prompts the user to use another expenditure type.

If the user clicks No, then a new message appears and it restricts the user from continuing through the validation process, and the user will not be able to submit the requisition.

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, and the user will not be able to submit the requisition.

Enhancement #2: Inventory Information Check

This enhancement will be applied to all purchase requisitions, and users will be notified of the changes through a message in the requisition validation process.

Enhancement #3: Requisition Value and Expenditure Type Check

This enhancement is designed to ensure that UC San Diego complies with its procurement policies and procedures. It is also intended to reduce the risk of unauthorized purchases, which could result in financial losses for the university.

Enhancement to Requisition Validation Process in OFC

We encourage you to share this information with your teams, colleagues, and those who may be interested in participating in the Financial Accounting Program.

We invite you to try out the different calendar views in the upper right corner.

No, then a new message appears and it prompts the user to use another expenditure type.

If the user clicks No, then a new message appears and it restricts the user from continuing through the validation process, and the user will not be able to submit the requisition.

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, and the user will not be able to submit the requisition.

Enhancement #2: Inventory Information Check

This enhancement will be applied to all purchase requisitions, and users will be notified of the changes through a message in the requisition validation process.

Enhancement #3: Requisition Value and Expenditure Type Check

This enhancement is designed to ensure that UC San Diego complies with its procurement policies and procedures. It is also intended to reduce the risk of unauthorized purchases, which could result in financial losses for the university.

Enhancement to Requisition Validation Process in OFC

We encourage you to share this information with your teams, colleagues, and those who may be interested in participating in the Financial Accounting Program.

We invite you to try out the different calendar views in the upper right corner.

No, then a new message appears and it prompts the user to use another expenditure type.

If the user clicks No, then a new message appears and it restricts the user from continuing through the validation process, and the user will not be able to submit the requisition.

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, and the user will not be able to submit the requisition.

Enhancement #2: Inventory Information Check

This enhancement will be applied to all purchase requisitions, and users will be notified of the changes through a message in the requisition validation process.

Enhancement #3: Requisition Value and Expenditure Type Check

This enhancement is designed to ensure that UC San Diego complies with its procurement policies and procedures. It is also intended to reduce the risk of unauthorized purchases, which could result in financial losses for the university.
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.

9500 Gilman Dr, La Jolla, CA 92093 US

This email was sent to . To continue receiving our emails, add us to your address book.

Subscribe to our email list.