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

Announcements

UC San Diego Travel: Reporting Expenses
The course provides an overview of UC San Diego travel policy and procedure, including summarized guidelines, resources, and best practices for travelers and financial managers who are familiar with Travel Policy G-28 and would like to learn about more advanced practices.

In this course, you will learn about Concur processes for prepaying travel and claiming expenses after the business trip. 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 policies and procedures.

The course will be held on Thursday, October 27, 2022, from 9:00am - 11:00am.

IPPS Hot Topics: How to Search and Purchase Strategically
The session will cover the IPPS Acquisition Process, Accounts Receivable updates, FAQ and Reminders, followed by an open Q&A. We look forward to seeing you there!

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 for the Distribution of Charges? How to Purchase Inventorial Equipment in Oracle Procurement? We welcome you to phone a friend.

Even in 2022, there are no easy answers. We are here to help. We do not provide support in the form of a help desk. Instead, we will have two Financial Operations Office Hours every week: Every Thursday from 9:00am - 11:00am and Every Wednesday from 11:00am - 12:00pm. We encourage you to come prepared with your questions and struggles, and we will do our best to assist you. Nothing a fund manager does is off the table.

In financial operations, there is nothing that cannot be remitted or made to work. It is just a matter of time and expertise. We are here to help you figure it out!

Also, watch our video overview of the Internal Controls Blink page, available on our Event Calendar.

Fast Facts: October 19, 2022
- Starting tomorrow, October 19, the Office of Financial Controls (OFC) will launch a software enhancement to support the university's month-end financial reporting. This enhancement will improve the accuracy and efficiency of the month-end financial reporting process. The enhancement will also include additional checks to ensure the requisition is for inventorial equipment. The validation will now include an in-depth explanation of topics covered in the Concur Travel and Expense eCourse.
- If the user tries to submit a purchase requisition over $5,000 and uses the inventorial equipment expenditure type 163003, and the user is suggested to submit a ticket for support.
- If the user clicks Yes, then a new message appears prompting the user to use another expenditure type.
- If the user clicks No, then a new message appears prompting the user to check the box for Inventorial Equipment.
- If the user tries to submit a purchase requisition under $5,000 and uses the inventorial equipment expenditure type 163003, the system will display a message prompting the user to use another expenditure type.
- If the user tries to submit a purchase requisition over $5,000 and does not use the inventorial equipment expenditure type 163003, the system will display a message prompting the user to use another expenditure type.
- If the user clicks Yes, then a new message appears prompting the user to use another expenditure type.
- If the user clicks No, then a new message appears prompting the user to check the box for Inventorial Equipment.

- Enhancements to the requisition validation process in OFC: Enhancements to 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 the POETAF.

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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.

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