

Budget & Finance Weekly Digest

October 18, 2022 | 93rd Edition

Announcements



Advanced Search

IPPS is piloting a new search engine as part of a broader initiative to improve the Oracle Procurement client experience. The next time you login to Oracle Procurement to shop for goods or services, click on *Advanced Search* in the *Top Categories* section of the homepage to test drive this new feature. The Advanced Search tool offers enhanced search functionality and provides more product details - including attributes, images, and certifications.

IPPS Office Hours Special Guest

During the week of October 24th, LabViva will be joining [Procure to Pay and Travel & Expense Office Hours](#). They will be available to answer any questions related to the new Advanced Search tool, offering an alternative to the Oracle Procurement search bar. Please take the time to stop by and interface with that team!

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 information associated with an invoice. You can view this information in the **Distribution of Charges** tab after clicking on an invoice.



Reminder!

Financial Accounting Program: Upcoming Information Sessions

We invite you to hear more about the [Financial Accounting Program](#) by attending an upcoming **Information Session** for the following dates. Please register using links below:

- [Tuesday, October 25, 2022 @ 10:00am - 11:00am](#)
- [Thursday, October 27, 2022 @ 2:30pm - 3:30pm](#)

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 appreciate the partnership with UC San Diego Division of Extended Studies and the support from supervisors across campus.

Enhancement to Requisition Validation Process in OFC

Starting tomorrow, October 19, the current purchase requisition validation process that runs when the user submits the requisition in OFC will be enhanced. The validation will now include additional checks when the inventorial equipment expenditure type (163003) is used in the POETAF.

Enhancement #1: Requisition Value 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 prompting the user to review guidance on purchasing inventorial equipment and confirm the requisition is for inventorial equipment.

The Approval Amount does not meet the \$5,000 threshold for Inventorial Equipment Requisitions.

Inventorial Equipment, also known as capital equipment, assets, tangible personal property, etc., must have an acquisition value of \$5,000 or more and is tracked by UCID in CAMS.

For guidance on purchasing inventorial equipment, use the knowledge base article (KBA):

[How to Purchase Inventorial Equipment in Oracle Procurement](#)

After reading the guidance above, is this requisition for inventorial equipment?

Yes

No

By WalkMe

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

Please select a different expenditure type



Use the [Expenditure Type List](#) in the Project Information Lookup Report in the Business Analytics Hub to find an appropriate Expenditure Type.

After you enter the expenditure type, use your Tab key to update the chart string.

Then, click Next.

Next

| Number | Expenditure Item Date | Expenditure Type | Expenditure Organization | Contract Number |
|----------------------|-----------------------------------------|-----------------------------------------|------------------------------------------|----------------------|
| <input type="text"/> | <input type="text" value="09/29/2022"/> | <input type="text" value="163003 - I"/> | <input type="text" value="Procurement"/> | <input type="text"/> |

If the user clicks **Yes**, then a new message appears and it restricts the user from continuing through the validation process, and the user is suggested to submit a ticket for support.

Inventorial Equipment requests must be over \$5,000.

Verify that you have entered the appropriate dollar amount as seen in the quote provided to you by the vendor.

If the Approval Amount is less than \$5,000, contact a professional buyer by [submitting a support form \(Link\)](#). In the *More Specifically* field, enter "How to shop" for faster response time.

By WalkMe



Manage Approvals

View PDF

Save

Last Saved 09/23/2022

Requisition Amount 4,000.00 USD

Approval Amount Calculate Amount with T

Funds Status Not reserved

Attachments None +

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 the Inventorial Equipment check box is **not** checked; then a new message appears prompting the user to check the box for Inventorial Equipment.

When you are using Expenditure Type: 163003 - Inventorial Equipment, check the Inventorial Equipment box.

Note: Scroll to the right on the Project Costing Details table to find the Inventorial Equipment box.

By WalkMe

Deliver-to Address Toney Pines Court 3333, 3333 N. Toney Pines Ct. LA JOLLA, CA

| Requisition | Contract Number | Funding Source | Charge Account | Budget Date | Percentage | Quantity | Amount (USD) | Funds Status | Inventorial Equipment |
|-------------|-----------------|----------------|----------------------------------------|-------------|------------|----------|--------------|--------------|--------------------------|
| | | | 10150.13001.6000043.103003.720.000.000 | 09/23/2022 | 100 | 1 | 5,500.00 | Not reserved | <input type="checkbox"/> |
| Total | | | | | 100 | 1 | 5,500.00 | | |

Please review the [How to Purchase Inventorial Equipment in Oracle Procurement](#) KBA for a review of this process, and feel free to submit a [Services & Support](#) ticket if you have questions.

Training & Support



Watch recorded office hours and more on our [UC San Diego Budget & Finance YouTube channel](#).

Internal Controls Office Hours

Every Wednesday

1:00pm - 2:00pm

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.

Upcoming Travel Webinars

Wednesday, October 19, 2022

11:00am

American Airlines will 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 Certificate (2 winners); Admirals Club one day passes (4 winners); and 2 winners will get a status upgrades (winners will go up one tier from their current status up to and including Platinum).

Financial Operations Office Hours

Friday, October 21, 2022

9:00am - 10:00am

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!

IPPS Hot Topics: How to Search and Purchase Strategically

Thursday, October 27 @ 10:00am – 11:00am

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.

UC San Diego Travel: Before You Go

Thursday, October 27, 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, October 27, 2022

1:00pm - 3:00pm

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 to Travel Policy G-28.

Intended for: Those involved in the process of trip reconciliation for business travel at UC San Diego, including travelers, preparers (Concur Delegates) and approvers.



Have Finance-related questions?
Call the UC San Diego Finance Help Line.

(8 5 8) 2 4 6 - 4 2 3 7 **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!



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
BUDGET 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](#).

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UC San Diego

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