

Budget & Finance Weekly Digest

October 4, 2022 | 91st Edition

Announcements



PPM Billing Features Launched on 10/03/22!

New PPM Billing features have been launched in PPM starting on Monday, October 3:

- **PPM Multiple Services**
 - Multiple Services gives users the ability to provide more granular information about the services being provided and billed
 - This includes the ability to reference an external customer PO# per customer invoice, instead of at the contract level
 - You can now add the information on the Event, which will be displayed on the AR Customer Invoice
 - For more information, read the [How to Create a PPM Contract in Order to Bill External Customers](#) and [How to Create a Project Portfolio Management \(PPM\) Billing Invoice in Oracle](#) KBA's
- **PPM Recurring Billing**
 - This feature has been delayed and will be launched at a later time.
- **Event Completion Date is now a required field**
 - Event Completion date is needed for PPM to generate a Draft Invoice. This field is now required when creating an event.

Deadline for Submitting Taxable Travel/Move/Relocation Expense Reports

Due to payroll and taxation deadlines, Expense Reports for employee moves, or trips including taxable payments/reimbursements, must be completed with required attachments and approved by the Financial Unit Approver by **October 17**. Expense Reports with taxable expenses that are submitted after the deadline will be processed for payment in January 2023. For instructions on the move process in Concur, please review the [How to Manage a Move Trip KBA](#).

Questions? Please submit a [Services & Support](#) ticket and select "Travel Moves" in the More Specifically category.

New Advanced Search Available in Oracle Procurement

Integrated Procure-to-Pay Solutions is piloting a new search engine as part of a broader initiative to improve the Oracle Procurement client experience. The new tool will enhance search functionality and give you a much better view of your products including attributes, images, and certifications.

To get to Advanced Search, visit the Oracle Requisitions screen and click the first icon under Top Categories that says 'Advanced Search' with the logo of a magnifying glass & laptop. Take a test drive and let us know what you think from the survey link found on the Advanced Search homepage! We are also looking for volunteers to join a group that will provide ongoing feedback to the team building Advanced Search; sign-up to join from the survey link. We appreciate your feedback as we continue to focus on improving the search experience in Oracle Procurement.

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.



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

Equipment Asset Management Office Hours

Wednesday, October 5, 2022

1:00am - 12:00pm

Join Jamie Wheat and the Equipment Asset Management team for office hours this week to view a demo of the new integration from Oracle to CAMS.

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.

Oracle: Buying and Paying for PO Requisitioners

Thursday, October 6, 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.

PPM Contract and Invoice Training

Tuesday, October 11, 2022

10:00am - 11:00am

Register for next week's comprehensive training course providing instruction on contract, event, and invoice creation and requirements. This virtual training is set to occur every 2nd Tuesday of the month at 10:00am and will reoccur on 11/08.

Use [this link](#) to register for the next webinar.

Reporting Workshop: Dashboard of the Week Series

Tuesday, October 11, 2022 @ 10:00am - 11:00am

Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include an interactive report demo, discussion of what questions the report can answer, opportunities to ask questions and walk through your use cases, and hear how others are using the dashboard or report. This week's session will feature the **Expanded Project Summary** report.

More information about the series and a full schedule can be found on the [Reporting Workshop Blink page](#).

Oracle: Buying and Paying for Financial Unit Approvers

Thursday, October 13, 2022

9:00am - 11:00am

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as reviewing for and populating POETAF information during the ordering process, approving requisitions and invoices, revising orders, and checking PO invoice status. This course will be especially valuable for individuals responsible for those responsible for approving requisitions and invoices on behalf of their financial unit.

Please note the [Introduction to Oracle Procurement & Payables eCourse](#) is a required prerequisite for registration.

Concur: Event Expenses & Other Reimbursements

Thursday, October 13, 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.

[Upcoming Travel Webinars](#)

Wednesday, October 5, 2022 @ 11:00am

Alaska Airlines will provide updates on their operations, current offers and ongoing sustainability efforts. They will also give TWO lucky travelers ONE round trip ticket anywhere Alaska flies and provide SIX upgrade vouchers that will allow travelers to upgrade their tickets to First Class.

Wednesday, October 12, 2022 @ 11:00am

Expect updates on the industry, their sustainability platform and availability of electric vehicles to UC's contract. Enterprise will upgrade FIVE winners to Emerald Club Executive. Only those in attendance will be eligible to win.

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).

[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.



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!

Tips & Tricks

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 finance.support@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](#).

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