April 13th, 2021 - 15th Edition

Budget & Finance Weekly Digest

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- **Information System and Support Departments’ Success in Managing Fiscal Responsibilities:**
  - Concur Travel & Expense Categories Blink page
  - Purchasing categories and how tax is determined on research equipment. You can read more about the taxability of different purchasing categories and certain checkboxes in the distribution section (such as Taxability of Requisitions and Purchase Orders).
  - Visit the Oracle Financials Cloud to browse through instructor-led Concur courses.

Thursday, April 22, 2021

**Planning to Travel? Jet over to the UC Learning Center!**

**Concur Travel & Expense**

**Wednesday, April 21, 2021 @ 9:00am - 10:30am**

**Financial Reporting & Salary Projections: Seminar 9**

- Topics include internal revenue, tailored information for auxiliary units/recharge,
- Join the IPPS Team for the next session of Hot Topics! This session will focus into your OFC transactions. Don’t miss it!

**Oracle Procurement.** Our instructors will be reviewing Oracle Procurement and on the importance of profile setup and management as it relates to Concur and provide a live tutorial, and host Q&A.

**Hot Topics: Profile Setup & Management**

**Dashboard is designed to give you insights into all transactions related to UC**

**Join Oracle functional leads and the Oracle BI team as we dive into the new**

**BI & Financial Reporting: P2P Panorama**

**Friday, April 16, 2021 @ 9:00am - 10:30am**

**Costs vs. Production Numbers**

**ASCO/UCSD**

**Saturday, April 17, 2021 @ 9:00am - 10:30am**

**Costs vs. Production Numbers**

**IPPS Executive Summary**

**Target date for collecting updates is 4/28 - begin completing the files today!**

**Additional Resources:**

- **Register for an Upcoming Training Class or Event**
- **Check out the IPPS Executive Summary**
- **Scroll down to the summary of your classes or events.**
- **Register for the informational webinar on April 20th at 9am.**

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**UCSD Travel: Before You Go**

- **Sigma Aldrich Unavailable in Catalog**
  - As part of our efforts to enhance the Oracle user experience, we have removed the approval amount from the Concur travel request. As a result, you will need to manually calculate the amount in Concur and submit the request for approval. The approval amount will be recalculated in Concur after the request is submitted.

**UCSD Travel: Reporting Expenses**

- **Top Categories**
  - Uncheck the slider to remove categories from the Blink page.
  - Select categories to add them back to the Blink page.
  - Open your settings to view all categories.

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**UCSD Budget & Finance Digest**

- **Mapping of Purchasing Categories in Concur**
  - As of April 9, 2021, the Purchasing Categories have been updated in Concur. The new categories are designed to better align with the Oracle Procurement system. The following categories have been added:

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food &amp; Beverage</td>
<td>Purchasing items related to food and beverage</td>
</tr>
<tr>
<td>Clothing</td>
<td>Purchasing items related to clothing and apparel</td>
</tr>
<tr>
<td>Transportation</td>
<td>Purchasing items related to transportation</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>Purchasing items related to miscellaneous</td>
</tr>
</tbody>
</table>

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