Budget & Finance Weekly Digest

April 13th, 2021 - 15th Edition

Announcements

General

Restructure PPM General Projects (Update A) and Project Personnel Assignments (Update B)
Interested in *Restructuring your PPM General Projects* from having many tasks, to more projects with fewer tasks or *Updating PPM Personnel Assignments*? We are offering (2) **optional** one-time updates so that you do not have to submit individual Services & Support requests! The PPM General Project "reconversion" and Project Personnel Assignments will accomplish the following:

1. New Projects will be created systematically, carrying all data elements from the current task(s)
2. Mass "cost transfer" of all PPM Project costs from the current project task to the newly created project task
3. PPM Personnel Assignments will be mass updated and standardized across all projects

Additional Resources:

- Register for the informational webinar on **Friday, April 16th**: PPM Personnel Updates & Tasks to Projects Re-Conversion
  If you are unable to attend watch the session in recorded webinars.
- For instructions read KB0033376: Restructure PPM General Projects (Update B) and Project Personnel Assignments (Update B)

The target date for collecting updates is 4/28 - begin completing the files today!
Note: VC Health Sciences Task to Project requests will be coordinated through

the VCHS Accounting & Reporting team. For inquiries email vchsfinman@ucsd.edu.

IPPS Executive Summary

Check out the IPPS Quarterly Executive Summary for information on Oracle Procurement and Accounts Payables, Concur, and Services & Support! The report is a comprehensive review of the last quarter, it includes information on production numbers and IPPS achievements. This report will be shared at the beginning of every quarter.

Oracle Financials Cloud

Oracle Financials Cloud Role Updates

As part of our efforts to enhance the Oracle user experience, we have expanded the basic access that is provisioned to every user. Users now have additional inquiry and reporting roles to increase visibility within Oracle, especially around reporting. If you are familiar with our roles, the additional access now includes:

- GL Inquiry & Reporting (Ledger: UCSD, FOUNDATION)
- AP Reporting (Business Unit: UCSD Campus)
- PO Reporting (Business Unit: UCSD Campus)
- PPM Project Inquiry & Reporting (Business Unit: UCSD Campus) - task detail views are planned to be released later this month
- PPM Grants Inquiry (Business Unit: UCSD Campus)
- AR Inquiry & Reporting (Business Unit: UCSD Campus) - planned to be added later this month

Part of the reason for this role provisioning effort was due to a number of Services & Support tickets opened by users that did not have appropriate access. We discovered that a large population of users were missing a critical piece of security access, which was preventing them from running reports and viewing data within Oracle (mainly within the Projects and Awards spaces). With this role provisioning effort, we have been able to provision these users correctly, and these issues should be resolved now.

Within Oracle, you may notice new modules/icons that you did not previously have. With the expanded privileges, please remember that UC San Diego is committed to maintaining and protecting privacy for individuals and the confidentiality of institutional information. This requires the handling of information to ensure that it will not be disclosed in ways that are inconsistent with authorized use and its original purpose.

General Projects Update
General Project PPM Budget workflow is now turned off. As soon as the initiator completes the budget and submits it, it will be baselined and will show up in reports.

Cost Transfer Approval Notifications
As a cost transfer approver, you can now approve/reject the cost transfer without claiming. Previously, you would claim the approval, the screen would close and you would reopen to approve. Now, you can approve when you initially view the workflow.

Tax Populating Correctly in Oracle Procurement
You should now have the ability to view the correct tax amount on your Purchase Orders and requisitions in Oracle Procurement. In your shopping cart, in *Approval Amount* at the top right of the page, click *Calculate Amountwith Tax* to view the tax associated with your order. If you change the taxability of any of your lines or add new lines, you can recalculate the tax amount by clicking *Check Funds* at the top of the page.

Sigma Aldrich Unavailable in Catalog
The Sigma Aldrich catalog has been temporarily removed from the catalog in Oracle Procurement to allow for updates in pricing. You may still order from Sigma Aldrich using their punchout. On the Oracle Procurement homepage, scroll down to *Top Categories*, and click *All Punchouts* to get started. You may refer to our KBA for additional details on ordering through punchout.

Concur Travel & Expense

Return to Travel
Per the campus notice issued on April 9th, restrictions on travel for UC San Diego employees have been removed. Reminder, **all employees should book travel in Concur** when traveling on behalf of the university in order for travelers to receive critical information about their destinations, automatically register for UC's Traveler Insurance, protect travel funds, and facilitate efficient trip reconciliation upon return. Guidance on booking travel in Concur is available on Blink.

In response to the Chancellor's announcement regarding the Travel Policy Update, the requirement to attach the Form for Essential Travel has been removed from Concur Travel Requests for business travel starting April 9, 2021. For business travel between October 21, 2020, and April 8, 2021, the requirement for the completed Form for Essential Travel remains.

Click to view all known transitional issues impacting financial processes and reports. This list was curated specifically to support financial review and corrective actions by department fund managers.

Training & Support

Register for an Upcoming Training Class or Event

PPM Personnel Updates & Tasks to Projects Re-Conversion
Friday, April 16, 2021 @ 8:30am - 9:30am
Join us for a webinar on two optional, one-time processes to support departments for 1) Updating Project Personnel such as Fund Manager and MSO/DBO and 2) Re-conversion of existing tasks to new projects, including costs!

BI & Financial Reporting: P2P Panorama
Thursday, April 22, 2021 @ 9:00 - 10:30am
Join Oracle functional leads and the Oracle BI team as we dive into the new Procure-to-Pay Panorama. Built on Oracle data analytics' power, this dashboard is designed to give you insights into all transactions related to UC San Diego's supply chain within Oracle. This live overview of the P2P Panorama will provide you with the interactive tools you need to gather insights into your OFC transactions. Don't miss it!

Hot Topics: Profile Setup & Management
Wednesday, April 28, 2021 @ 11:00am - 12:00pm
Join the IPPS Team for the next session of Hot Topics! This session will focus on the importance of profile setup and management as it relates to Concur and Oracle Procurement. Our instructors will be reviewing Oracle Procurement and Concur best practices, provide a live tutorial, and host Q&A.

Fund Management Training Series

Subledger Variances: Seminar 7
Wednesday, April 14, 2021 @ 9:00am - 10:30am
Topics include Default Projects, Purchase Orders and Commitment Reconciliation, Exception reporting, & Cost transfers.

Internal Revenue/Recharges: Seminar 8
Monday, April 19, 2021 @ 9:00am - 10:30am
Topics include internal revenue, tailored information for auxiliary units/recharge, PPM updates and more!

Financial Reporting & Salary Projections: Seminar 9
Wednesday, April 21, 2021 @ 9:00am - 10:30am

Topics include reports.ucsd.edu, faculty MyFunds/EBS-like reporting, standard & managerial account hierarchy updates, salary projections, and new PPM names on reports!

Concur Travel & Expense

Planning to Travel? Jet over to the UC Learning Center!
Register today and join the Travel team as they go over Concur Travel & Expense tips and travel policy guidelines. **The next Travel Training day is Thursday, April 22, 2021**.

4/22/21: **UCSD Travel: Before You Go** @ 9:00am
4/22/21: **UCSD Travel: Reporting Expenses** @ 1:00pm

Please note that you can also search "Concur" in the UC Learning Center to browse through instructor-led Concur courses.

Visit the Training & Events Calendar for information on upcoming webinars.

Tips & Tricks

UC Employee Honorarium Payments
For tax purposes, honorarium payments to UC employees must be processed through UCPath following the multi-location appointment guidelines. For instructions on how to process UC Employee Honorarium Payments, visit the PayPath Transactions section and see the UCPath job aid for How to Manage Multi-Location Appointments.

Oracle Financials Cloud

Taxability of Requisitions and Purchase Orders
The taxability of your order in Oracle Procurement is determined by the purchasing category and certain checkboxes in the distribution section (such as research equipment). You can read more about the taxability of different purchasing categories and how tax is determined on the Purchasing Categories Blink page.

Concur Travel & Expense

Google Chrome Autofill

Google Chrome's Autofill feature might interfere with entering your chart string information in Concur. The Autofill feature will display values to facilitate data entry, but these selections do not transfer to Concur.

After clicking into the form field, the autofill will clear after you start typing in the chart string value when creating a Request, Expense Report, or Allocation.

To turn off Google Chrome's Autofill feature:

1. Open your *Settings*
2. Select *Autofill* from the left-hand navigation bar
3. Select *Addresses and more*
4. Uncheck the *Save and fill addresses* slider

About the Weekly Digest

Each Tuesday important updates related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense, are delivered to your inbox. Our goal is to deliver timely information that matters to you.

Contact us

Have questions about this edition? The best way to contact our team is via Services & Support.

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial information system and support departments' success in managing their fiscal responsibilities.
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