April 13th, 2021 - 15th Edition

Budget & Finance Weekly Digest

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Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial system. Here are some of the latest developments:

Taxes & Reporting
- Oracle Procurement tax functionality has been updated to include the taxability of your order in Oracle Procurement, determined by the purchasing category and certain checkboxes in the distribution section (such as E177.01.06). For more information, please refer to the Oracle Procurement documentation.
- The taxability of Requisitions and Purchase Orders in Oracle Procurement is also determined by these factors.
- The taxability of UC Employee Honorarium Payments is handled separately.

Tips & Tricks
- Oracle Procurement: A note about taxability. When purchasing from multiple vendors, it's important to consider the taxability of each order. You can control this through the taxability checkbox on the distribution section of the order.
- Tax Populating Correctly in Oracle Procurement: There might be known transitional issues when entering chart numbers, especially around reporting. If you are familiar with our roles, the additional level of detail can be provided by entering the chart string.

Oracle Procurement
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- The taxability of Requisitions and Purchase Orders in Oracle Procurement is also determined by these factors.
- The taxability of UC Employee Honorarium Payments is handled separately.

Concur
- Join Oracle functional leads and the Oracle BI team as we dive into the new TaxPopulating functionality in Concur. This will include an overview of the new TaxPopulating feature and how it integrates with Oracle Procurement.
- Join us for a webinar on Hot Topics: Profile Setup & Management. This webinar will cover best practices, provide a live tutorial, and host Q&A.

Planning to Travel? Jet over to the UC Learning Center! Concur Travel & Expense
- Registration for the UC Learning Center is now open. Please note that you can also search "Concur" in the UC Learning Center to find more courses.
- Topics include reports.ucsd.edu, faculty MyFunds/EBS-like reporting, standard exception reporting, and cost transfers.

Webinars for UC Staff
- Wednesday, April 21, 2021 @ 9:00am - 10:30am: Internal Revenue/Recharges: Seminar 8. This webinar will focus on internal revenue and tailored information for auxiliary units/recharge.
- Wednesday, April 14, 2021 @ 9:00am - 10:30am: Fund Management Training Series. This webinar will cover topics such as Default Projects, Purchase Orders and Commitment Reconciliation, Exception reporting, and Cost transfers.
- Wednesday, April 28, 2021 @ 11:00am - 12:00pm: Hot Topics: Profile Setup & Management. This webinar will cover best practices, provide a live tutorial, and host Q&A.

Additional Resources:
- Financials Cloud and Concur Travel & Expense: Each Tuesday important updates related to planning for upcoming travel will be posted. Visit the Budget & Finance, including Oracle Financials Cloud production page to access the latest information.
- Financials Cloud Role Updates: General Project PPM Budget workflow is now turned off. As soon as the initial view is complete, the workflow will be restored.
- Oracle Financials Cloud: Oracle Financials Cloud Role Updates. The target date for collecting updates is 4/28 - begin completing the files today!
- San Diego’s Supply Chain: Join us for a webinar on MSO/DBO and 2) Re-conversion of existing tasks to new projects, including PPM Personnel Assignments will be mass updated and standardized across all projects.

Stay tuned for upcoming events and webinars. For more information, please visit our website or contact our support team.