Budget & Finance Weekly Digest

March 22, 2022

63rd Edition

Announcements

Oracle Release Updates for March 2022
As of **March 21, 2022**, global and system-specific updates have been added, and known issues have been addressed and fixed by Oracle. View the full list of changes outlined on this Blink page.

Legacy Revenue on Sponsored Initiated Clinical Trials Has Been Fixed
Legacy revenue generated from OCTA Application on Sponsor Initiated Clinical Trials that did not convert for the awards listed here were successfully added to OFC on **March 17, 2022**. Revenue on sponsored projects can be reviewed using the Cumulative Research Report on the Project Balances with Expenditure Details Dashboard (PBED) that can be accessed via the Business Analytics Hub.

Camp IPPS Will be Hosted in August
We are excited to announce that Camp IPPS will be held from **August 15** to **August 19**! This is a great opportunity to meet the members of our various team areas and tie into trainings

associated with procure-to-pay and travel & expense. Please fill out this brief survey to indicate which classes you would be interested in attending during this week. You may request any topics related to Oracle Procurement, Oracle Payables, and Concur or any other subject matter associated with IPPS.

Praxair is Now Linde Gas & Equipment, Inc.
Praxair, a supplier frequently utilized for dry ice orders, has recently changed their name to **Linde Gas & Equipment, Inc**. Only their name, and *not* their offerings, are changing with this transition.

Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel.

Campus Budget Office: Office Hours
Every Thursday until March 31
10:00am - 11:00am
The Campus Budget Office will be hosting Office Hours to support budget preparers throughout the planning process. This week's Office Hours will have an open Q&A. There are only 2 sessions remaining, so be sure to stop by with any questions you may have!

Fund Management Office Hours
Every Thursday
11:00am - 12:00pm

This week, Thomas Qian from Financial Operations will lead a training and discussion on how revenue and receivables transactions flow through Oracle and how actions taken in Oracle appear on General Ledger transaction detail reports.

Q&A with UC San Diego IPPS Travel Team

Wednesday, March 23, 2022
11:00am - 12:00pm
Join the UCSD IPPS Travel Team and UCOP's Central Travel Office for a Q&A webinar on booking travel in Concur. Bring your questions and find out more about our complete managed travel program.

Concur: Event and Expense Reimbursements

Tuesday, March 29, 2022
9:00am - 11:00am
This live course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. Intended for preparers, hosts/payees, and financial managers who are familiar with policy and would like to learn about the expense reconciliation process in Concur.

Faculty and Researcher Dashboard Office Hours

Wednesday, March 30, 2022
8:00am - 11:30am
An updated Faculty & Researcher Dashboard was released on March 15. Drop in anytime at this post-release support session to ask questions about navigating the dashboard or how to interpret the data shown. Please inform the faculty you work with that this support session is available for them.

Hot Topics: Supply Chain Updates

Wednesday, March 30, 2022
1:00pm - 2:00pm
Join IPPS for its next occurrence of Hot Topics! For this session, we will be focusing on the impact supply chain has had on procure-to-pay processes at the university, and current supply chain state of affairs. There will be time allotted for Q&A at the end of the session.

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

(858) 246-4237 **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.

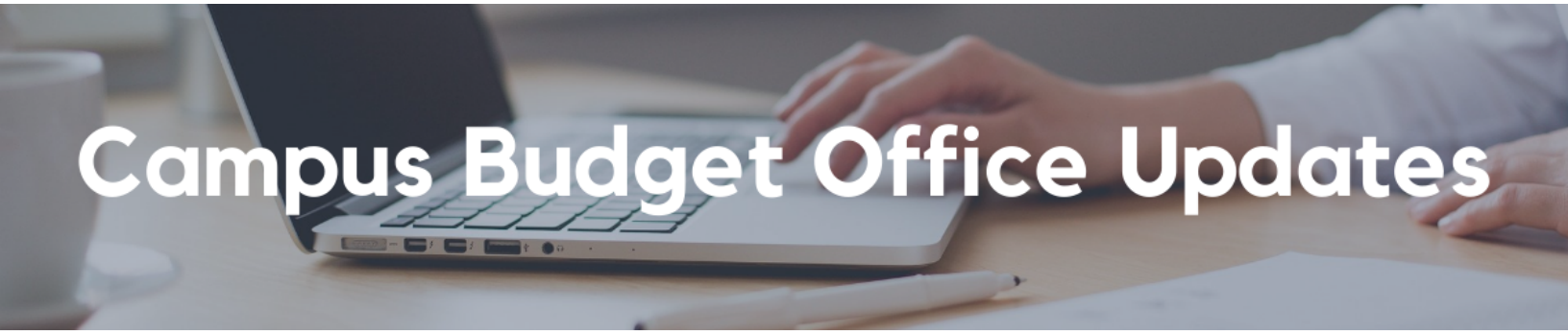
Be sure to try out the different calendar views in the upper right corner!

Upcoming Report Release: Default Project Payroll
On **Tuesday, March 29**, BI & Financial Reporting will release the **Default Project Payroll report**. The new report provides transactions on the Oracle Default Project needing correction with all related Labor Ledger information required to determine the corrective action and complete Direct Retros or a DrPat file. See Report Development on Blink for additional information on upcoming report releases.

Support Options for Oracle BI Upgrades
Thank you for your patience while Oracle upgraded its reporting technology. The upgrade is now complete. To best support you following this pause, the BI & Financial Reporting team will be hosting an Infinity Zoom Line to help you when you need it. If you are noticing an Oracle panorama or report isn't working, jump on and talk to an expert at your convenience. The Infinity Line will be open:

- **March 22 – 24:** 8:00am - 4:00pm
- **March 28 – March 30:** 10:00am - 2:00pm

If you prefer to submit a ticket, please contact the BI & Financial Reporting team through the Services & Support portal.



Reminder: FY23 Budget Entry Deadline on Friday, April 1
On **April 1**, the budget system will be locked for entry and will become view-only for budget preparers. There are **2 remaining office hour sessions** for support. Please join the Budget Team for any assistance you need every Thursday (10:00am - 11:00am) **until March 31**.

Data Gap Identified for FY23 One-Time Budget Planning

- **What Occurred?**
  - Approved and transacted one-time commitments from the Resource Commitment Tracking Tool did not load to the FY23 budget forms as expected for planning purposes. The amounts should have been visible in the Commitment Tracking Detail column in Forms 4.3, 5.1 and 5.2
- **Who is Impacted?**
  - Select areas who were using the Resource Commitment Tracking Tool for allocation of one-time funding commitments prior to January 2022. You may be impacted if you provided the funding or were the receiving unit of the funding.
- **How to Correct the Issue?**
  - There will be a load of one-time budgets to correct for the error and units may resume planning for FY23 one-time budgets. The Campus Budget Office team will reach out to Vice Chancellor areas and budget preparers who have already finalized FY23 budget plans or have one-time budgets in risk of duplication.

Oracle Training & Resources

Are you a new user in Oracle Procurement or someone who could use a refresher on procure-to-pay resources? Refer to our Oracle Procurement: Help Blink page for information on training opportunities, resources, and a guide to our numerous KBAs.

Dry Ice Deliveries

For recurring dry ice deliveries, consider using your Procurement Card. You may contact our Linde (formerly Praxair) representative directly to transition your purchases to Procurement Card:

> **Alicia Alvarez**
> AR Account Manager – West Region
> Ph: 800-266-4369 Ext. 26196
> Email: Alicia.Alvarez@linde.com

Searching for COA/POETAF Values in Concur

When searching in the drop-down menu for chart string and project values by the **Code** filter, enter the numeric code in Concur.

When searching by the **Text** filter, the text description of the value needs to be entered in exactly.

For instance, the Expenditure Type for In-State Travel has a **Code** of *536000*, and the **Text** is *Travel-In-State-(SD)*. You would need to enter the text precisely as the description from the Expenditure Type List with the appropriate hyphens. For more information on this, please refer to our KBA on this topic.

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 Find Answers?

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

Resources:
- Attend an Office Hours session
- Contact the Finance Help Line
- Submit a request ticket in Services & Support

TIER 2 — Where Do I Go to Submit a Request?

Applies to you if you:
- Have a question that is unable to be answered in Tier 1
  - These questions typically require research
- Need to process a transaction in Services & Support
  - E.g. "I need you to process/approve/route…"
- Identify something that does not seem to be working properly

Resources:
- Find the form in our Request Catalog to process your transaction request

TIER 3 — Where Do I Go to Request an Enhancement?

Applies to you if you require:
- Report or System Enhancements including:
  - Advanced Configuration
  - Security Administration
  - Functional Integration

Resources:
- Enhancement Request Form
- 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 **find answers**?
- Where do I go to **submit a request**?
- Where do I go to **submit an enhancement or idea**?

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.

Visit Our Website | Subscribe to our YouTube | Contact Us

UC San Diego

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