Oracle and Concur Access Request Instruction Guide

The purpose of this Service and Support form is to allow people to request the level of access necessary for their work. The most basic level of access will be granted automatically when employee data is extracted from UCPath source data.

Navigate to the Services and Support website: https://support.ucsd.edu/services.

Select the link for BUDGET & FINANCE.

Select the link for GET HELP.

Select the link for Oracle and Concur Role Requests.
Inside the form, the **Submitted by:** field displays the person who is making the request.

**Who is this request for?** field is required and asks the person making the request to identify who the request is for. If the request is for yourself, enter your name there.

For the Standard Roles Section, answer the following three questions. Select either Yes or No.
Answering Yes to any of those questions, will generate additional questions and options where specific roles can be requested. Most people who need access beyond the most basic level of access will answer Yes to the first question.

For the Elevated Roles Section, answer the following two questions. Select either Yes or No.

Answering Yes to any of those questions, will generate additional questions and options where specific roles can be requested. Some people may need to select Yes for the first question because they require elevated privileges.

For the Training Section, confirm that person has completed all required trainings for the access being requested. Select the checkbox to continue.

Click the Next button to go to the next form.
Click the title for each option displayed to make selections.

**Oracle and Concur Role Requests**

Request access to Oracle Financials Cloud and Concur Travel & Expense.

- **Describe Needs**
- **Choose Options**
- **Summary**

**Included Items:**

- **Oracle System Roles**
  - Request for Oracle roles by domain
  - *Options*

- **Oracle Elevated Roles**
  - Request for elevated Oracle roles by domain
  - *Options*

- **Oracle & Concur Approvers**
  - Request for Oracle and Concur Workflow/Approver Roles
  - *Options*

- **Concur Elevated Roles**
  - Request elevated Concur roles
  - *Options*

- **Oracle & Concur Other Roles**
  - Request for delegated purchasing authority and other roles
  - *Options*

**Oracle System Roles**

When the **Oracle System Roles** option is displayed, identify the Business Unit the person needs access to.
In order to select the correct financial unit, please be aware that the number is important because some financial units have similar names. Here are the areas that each financial unit number represents:

- Numbers starting with 1: are part of Vice Chancellor area, Academic Affairs.
- Numbers starting with 2: are part of Vice Chancellor area, Marine Sciences.
- Numbers starting with 3: are part of Vice Chancellor area, Health Sciences.
- Numbers starting with 4: are part of UC San Diego Health System.
  - Numbers starting with 41 to 42: are part of the Medical Center.
  - Numbers starting with 43: are part of UC San Diego Physician Group.
  - Numbers starting with 44: are part of UC San Diego Population Health Services Organization.
- Numbers starting with 5: are part of Vice Chancellor area, Chief Financial Officer.
- Numbers starting with 6: are part of Vice Chancellor area, Student Affairs.
- Numbers starting with 7: are part of Vice Chancellor area, Resource Management and Planning.
- Numbers starting with 8: are part of Vice Chancellor area, Research Affairs.
- Numbers starting with 9: are areas outside of the ones mentioned above, such as Academic Senate.

For the question, Which financial domain(s) does the person work in?, select the checkboxes to display fields where roles can be selected.
For example, the PPM General Projects selection will display the field to select the UCSD PPM Project Budget and Contract Manager role or the UCSD PPM Project Inquiry and Reporting role, or both. Multiple roles can be selected.

As another example, the PPM Awards selection will display the field to select the UCSD PPM Grants Inquiry role. Here only one role is available to be selected.

Oracle Elevated Roles

If Oracle Elevated Roles option is displayed, then identify the Business Unit the person needs access to.
And then select the financial unit the person works in (see notes for Oracle System Roles above for more information on financial units).

For the question, *Which financial domain(s) does the person work in?*, select the checkboxes to display fields where roles can be selected.

For example, the PPM General Projects checkbox will display a field to select the roles available for this domain. Multiple roles can be selected.
In order to proceed with the request, the Elevated Role Justification needs be entered. This justification needs to state your reason the role is needed and why a domain lead should approve the request.

**Oracle & Concur Approvers**

If the Oracle & Concur Approvers option is displayed, then the first question will require Yes or No to be selected.

If Yes is selected for any of the four questions in this option, then the financial units need to be selected. Multiple financial units may be selected in the field.

For the next three questions, a Yes selection will need the person to attach the required delegation form. If the form is not attached, then the request will be rejected and a new request will need to be made.
Concur Elevated Roles

If the Concur Elevated Roles option is selected, then two questions are displayed. Responses to these questions default to No, and changed to Yes by the person making the request. These roles are primarily for employees with IPPS.

The first question is for the Export Controls approver role, and the second question is for the UC San Diego Travel Office within IPPS.
Oracle & Concur Other Roles

If the Oracle & Concur Other Roles option is displayed, then identify the financial unit, and then select the amount of delegated authority. Select one of the three levels provided. Approval documentation may be attached, if the person making the request has documentation for the delegated authority.

Order Guide Details

Before the request is submitted, the Summary details are provided. Simply confirm the main options that were selected, and then click the Submit button to begin the workflow approval process or click the Edit Options button to go back.
Oracle and Concur Role Requests
Request access to Oracle Financials Cloud and Concur Travel & Expense

Order Guide Details

Oracle System Roles

Oracle Elevated Roles

Oracle & Concur Approvers

Concur Elevated Roles

Oracle & Concur Other Roles