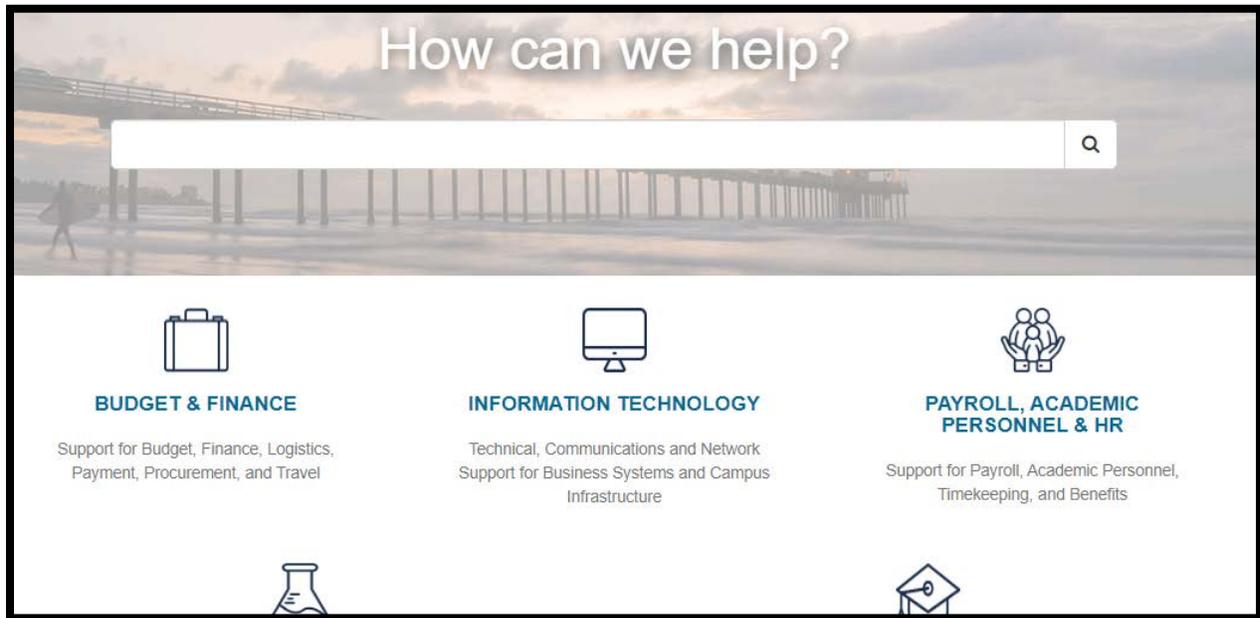


Oracle and Concur Access Request Instruction Guide

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>.

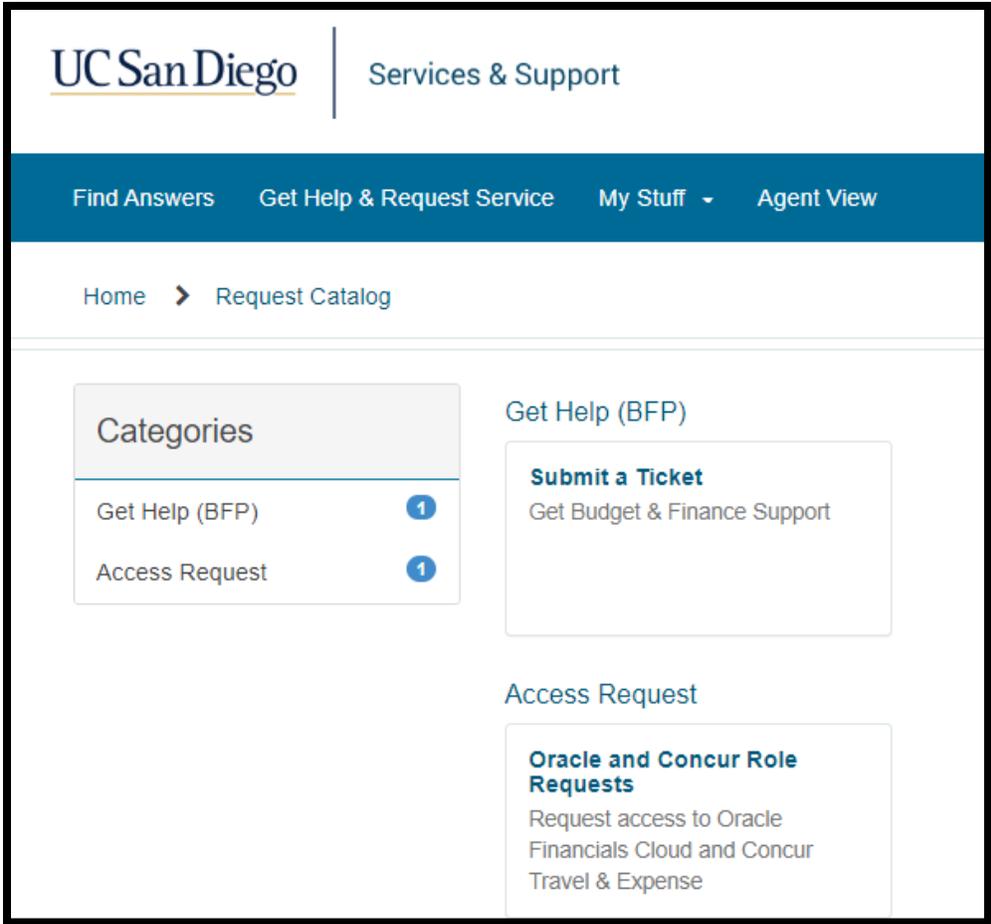
Select the link for BUDGET & FINANCE.



Select the link for GET HELP.

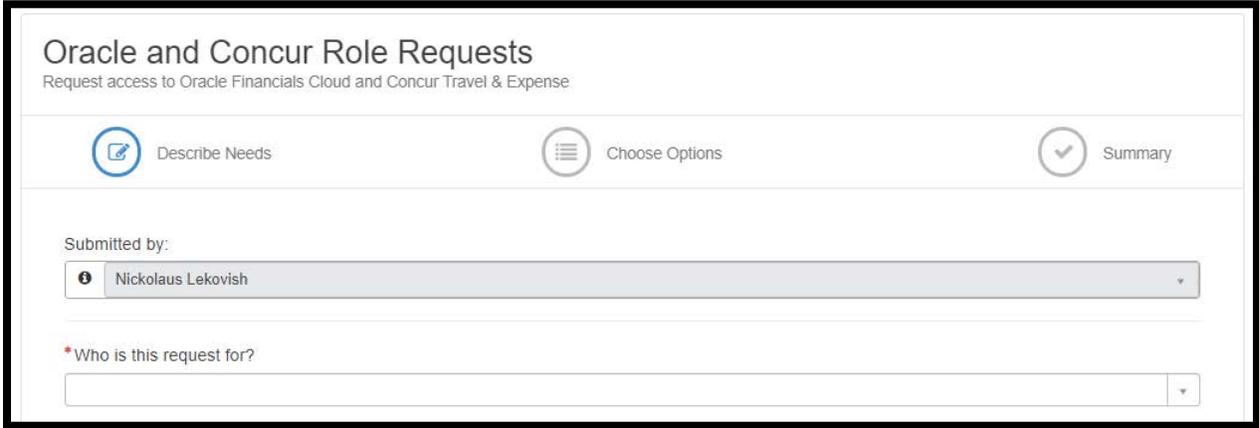


Select the link for Oracle and Concur Role Requests.



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.

Standard Roles Section

Does the person need access to Oracle roles? ⓘ

Learn more about Oracle and Concur Role Requests ✕

-- None -- ▾

Does the person approve financial transactions in Oracle and Concur? ⓘ

Financial Unit Approvers are responsible for approving financial transactions such as POs, invoices, travel, entertainment, gifts, and P-Card purchases. ✕

-- None -- ▾

Does the person need delegated purchasing authority? ⓘ

Delegated purchasing authority means the PO Requisitioner is able to purchase up to \$500, \$2500, or \$5000 without Financial Unit approval. ✕

-- None -- ▾

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.

Elevated Roles Section

Does the person need elevated Oracle roles? ⓘ

Elevated privileges are defined as roles or permissions that – if misused or compromised – could allow a person to exploit the University's financial systems or impact financial statements. ✕
Elevated roles are typically for IT Services and Central Office staff. With less frequency anticipated, departments may request elevated roles using the Oracle Elevated Roles section as part of more a stringent review/approval process.
Examples of elevated roles:
• General Ledger Roles (Journal Entry) for Level 3 FinUnit
• System Administration Roles for IT Services
• Cash and Banking Roles for Central Office

-- None -- ▾

Does the person need elevated Concur roles? ⓘ

Elevated Concur roles are typically for Integrated Procure-to-Pay Solutions (IPPS) staff only. ✕

No ▾

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.

Training Section 

Training is a requirement for financial system access privileges. Users that do not complete UC Learning online training activities may have system access revoked. Learn more about [Oracle and Concur Role Requests](#) 

Confirm that the person (requestor) has completed the required trainings.

[Next](#)

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: * Mandatory Fields

 Oracle System Roles	Request for Oracle roles by domain	* Options	<input checked="" type="checkbox"/>	▼
 Oracle Elevated Roles	Request for elevated Oracle roles by domain	* Options	<input checked="" type="checkbox"/>	▼
 Oracle & Concur Approvers	Request for Oracle and Concur Workflow/Approver Roles	* Options	<input checked="" type="checkbox"/>	▼
 Concur Elevated Roles	Request elevated Concur roles	* Options	<input checked="" type="checkbox"/>	▼
 Oracle & Concur Other Roles	Request for delegated purchasing authority and other roles	* Options	<input checked="" type="checkbox"/>	▼

[Previous](#) [Next](#)

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 the financial unit, please be aware that the number is important because some financial unit 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.

*Which financial domain(s) does the person work in?

?

If you do not see a domain or role listed, they may be part of the elevated Oracle roles section. The list below represents standard roles that satisfy the bulk of financial system user needs. You can stop here and go back to the first section (data is not preserved if you go back) or finish this request and submit a new request selecting 'yes' for elevated Oracle roles.

The following domains/roles are part of the Oracle Elevated Roles section:

- Procurement is not listed since everyone has \$0 purchasing authority and financial approvers are in a different section.
- General Ledger roles are typically for central offices only, since most actions have been shifted to sub-ledgers.
- Cash and Banking is for typically central office only
- System administration is typically for central offices only

PPM General Projects

PPM Awards

Accounts Receivable

Accounts Payable

Business Intelligence and Reporting

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.

PPM General Projects

PPM Awards

Accounts Receivable

Accounts Payable

Business Intelligence and Reporting

*What PPM General Projects role(s) does the person need?

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.

PPM General Projects

PPM Awards

Accounts Receivable

Accounts Payable

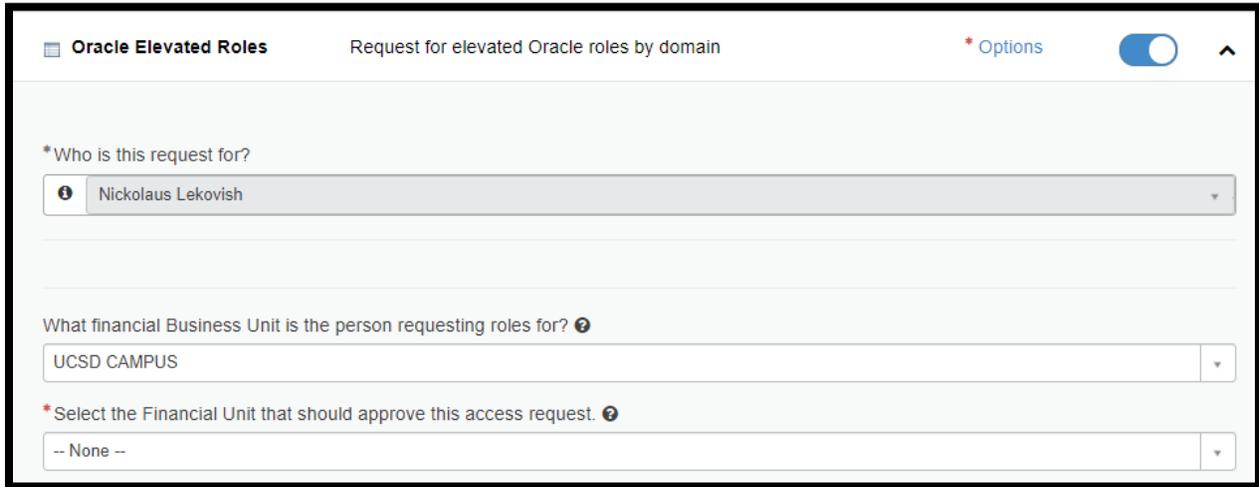
Business Intelligence and Reporting

*What PPM Awards role(s) does the person need?

Oracle Elevated Roles

If Oracle Elevated Roles option is displayed, then identify the Business Unit the person needs access to.

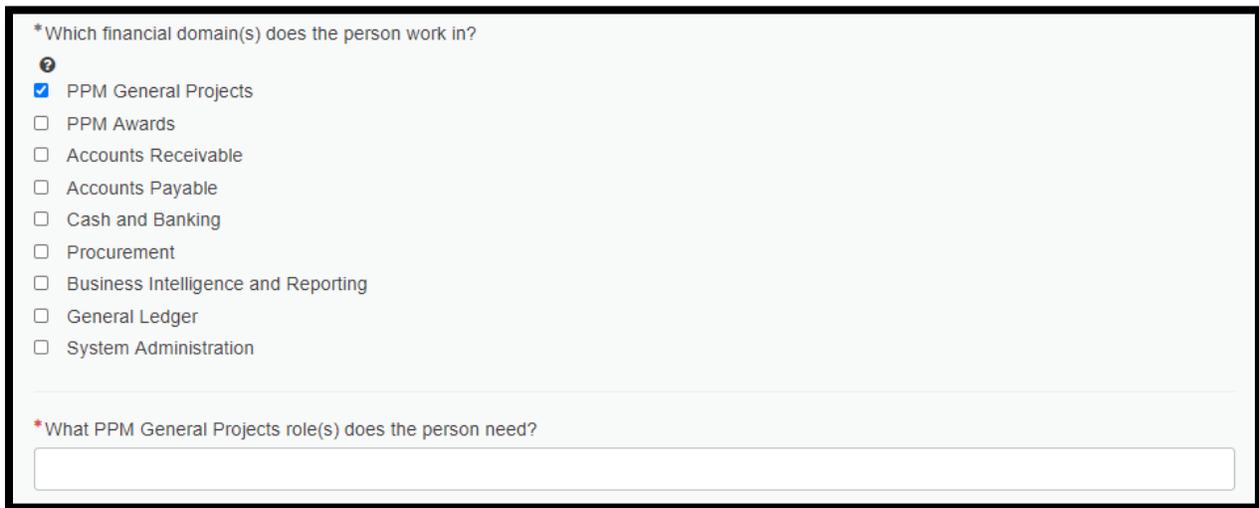
And then select the financial unit the person works in (see notes for Oracle System Roles above for more information on financial units).



The screenshot shows the 'Oracle Elevated Roles' interface. At the top, it says 'Request for elevated Oracle roles by domain'. There are three main sections:

- *Who is this request for?**: A dropdown menu with 'Nickolaus Lekovish' selected.
- What financial Business Unit is the person requesting roles for?**: A dropdown menu with 'UCSD CAMPUS' selected.
- *Select the Financial Unit that should approve this access request.**: A dropdown menu with '-- None --' selected.

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



This section shows a list of financial domains with checkboxes:

- PPM General Projects
- PPM Awards
- Accounts Receivable
- Accounts Payable
- Cash and Banking
- Procurement
- Business Intelligence and Reporting
- General Ledger
- System Administration

Below the list is a question: ***What PPM General Projects role(s) does the person need?** followed by an empty text input field.

For example, the PPM General Projects checkbox will display a field to selection the roles available for this domain. Multiple roles can be selected.

*Which financial domain(s) does the person work in?

PPM General Projects

PPM Awards

Accounts Receivable

Accounts Payable

UCSD PPM Project Adjustments JR	UCSD PPM Project Adjustments JR
UCSD PPM Project Asset Accountant JR	UCSD PPM Project Asset Accountant JR
UCSD PPM Project Billing JR	UCSD PPM Project Billing JR
UCSD PPM Project Cost Accountant JR	UCSD PPM Project Cost Accountant JR
UCSD PPM Project Management JR	UCSD PPM Project Management JR
UCSD PPM Project Period Management JR	UCSD PPM Project Period Management JR
UCSD PPM Project Setup and Maintenance (Config) JR	UCSD PPM Project Setup and Maintenance (Config) JR

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.

*Elevated Role Justification

Please describe the function the person performs and include a justification for why person needs role(s).

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.

*Is the person responsible for approving financial transactions on behalf of certain Financial Units?

Financial Unit Approvers are responsible for approving financial transactions such as POs, invoices, travel, entertainment, gifts, and P-card purchases. Select 'Yes' to assign this person the Financial Unit Approver role.

Yes

*Select the Financial Unit(s) the person is a Financial Unit Approver for.

Add all the Financial Units the person will be authorized to approve transactions for.

BFS General Accounting

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.

* Does the person have a Delegation of Authority for University Department Head signed by their Vice Chancellor? ⓘ

Select 'Yes' to designate this person as a Department Head and attach the required delegation form. ✕

Select 'Yes' to designate this person as a Department Head and attach the required delegation form.

Yes ▾

* Select the Financial Unit(s) the person is a Financial Unit Department Head for. ⓘ

Add all the Financial Units the person will be the Department Head approver for. ✕

✕ BFS General Accounting

* Does the person have a Delegation of Authority for University Sponsored Special Entertainment signed by the Chancellor? ⓘ

Select 'Yes' to designate this person as a Special Entertainment Approver and attach the required delegation form. ✕

Yes ▾

* Select the Financial Unit(s) the person is a Financial Unit Special Entertainment for. ⓘ

✕ BFS General Accounting

* Is the person responsible for the operations and administration of a Procurement Card Program? ⓘ

Select 'Yes' to designate this person as a P-Card Administrator and attach the signed delegation form. ✕

Yes ▾

* Select the Financial Unit that will approve this request.

BFS General Accounting | 5000043 ▾

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.

Concur Elevated Roles Request elevated Concur roles * Options

*Who is this request for?

Does the person need the Export Controls approver role?

Does the person need to operate as a general approver in Concur, outside the Processor role?

*Elevated Role Justification

Add attachments

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.

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

*Who is this request for?

*Select the home Financial Unit authorizing this person's purchasing delegation.

*Select the PO Requisitioner delegated purchasing amount

Everyone will have access to Oracle Procurement with a \$0 spending authority. Select one of the roles below if the person has delegated authority to purchase in Oracle without Financial Unit approval. ✕

Add attachments

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

 Describe Needs

 Choose Options

 Summary

Order Guide Details

Oracle System Roles

Oracle Elevated Roles

Oracle & Concur Approvers

Concur Elevated Roles

Oracle & Concur Other Roles

Edit Options

Submit