February 16th, 2021 - 7th Edition
Budget & Finance Weekly Digest

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Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial environment.

Take a look at the Knowledge Base Article on Where Are My Sub-Accounts?

Concur Travel & Expense tips and travel policy guidance. The next Travel training day is Thursday, February 25.

Oracle: The Elements of Accounts Payable Training
Beginning in March, Oracle: Buying and Paying for PO Requisitioners will be available.

Tip 2/25/21, 1:00 pm

Training & Support

Department reports now available include:
- Transaction Panorama Dashboard
- Project Cost Transfer Dashboard
- What is the Process for Interlocation Transfers of Funds?
- How to Install the WalkMe

Corrective actions by department fund managers.

Reports. This list was curated specifically to support financial review and reconciliation.

Supplier Number, Payee Name) in Payment Compass. Additionally, we will be including the following fields in the new Concur invoice information.

Line Description fields will be expanded to include certain payee details.

New Concur invoice information will launch this week in efforts to enhance the user experience.

The new Concur Line Description fields will be expanded to include certain payee details.

Introducing New Concur Invoice Number & Description

This issue has been escalated with Oracle for resolution. Thank you for your patience.

January Close Delay Update

Announcements

- January 25th, the Financial Information System project team launched the Fund Managers Training & Support Portal.
- The new Concur Line Description fields will be expanded to include certain payee details.

Customize your reports!

particularly between PPM, AP, and GL to support error correction of non-salary cost transfers. Target launch 2/18.

Project Cost Transfer Dashboard

Where Are My Sub-Accounts?

where the PO Requisitioner populated Project, Task and Expenditure.

Oracle: The Elements of Accounts Payable Training

They are now available for the current 2021 rate in Concur Travel & Expense.

To claim mileage expenses for another year other than the current 2021 rate in Concur Travel & Expense.

To claim mileage expenses for another year other than the current 2021 rate in Concur Travel & Expense.

Valid mileage rates for 2021 are:

- $0.565 per mile for business use
- $0.24 per mile for medical

For more information on mileage rates, please refer to the Browser Extension KBA.

How to Install the WalkMe

Watch how to change your account settings.

How to Install the WalkMe

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What is the Process for Interlocation Transfers of Funds?

This new report is available at reports.ucsd.edu > Transaction Panorama Dashboard. To access the report, select the chart labeled "Project Report Parent." This report provides financial position at any given point in time.

This new report is available at reports.ucsd.edu > Transaction Panorama Dashboard. To access the report, select the chart labeled "Project Report Parent." This report presents the data in a standard profit and loss statement format and includes the net financial surplus/(loss) by major fund groups for a particular Vice Chancellor. The report is available for all fund accounts. The report parameter is selected in the pull-down menu labeled "Budget vs Actual."

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