Planning to travel for UC San Diego business?

If you have questions about this edition, the best way to contact our team is via services.support@ucsd.edu. The goal is to deliver information promptly.

Oracle Financials Cloud and Concur Travel & Expense provide similar functionality. Watch this video to learn more!

The Oracle Financials Cloud does not have sub-accounts but does offer alternate hierarchies that can be helpful. Watch recorded office hours with the Oracle BI team as they share essential knowledge.

The three most popular reports now available include:
- Net Operating Results and Fund Balance
- General Ledger Report
- Project Balances with Expenditure Details

The Net Operating Results and Fund Balance report is presented in a standard profit and loss statement format and includes the fund balance, and budget variance in a profit and loss statement format for the current fiscal period and YTD.

The General Ledger Report includes a summary and detail drill down, and it is used for financial statements such as financial reports and P&L statements.

The Project Balances with Expenditure Details report is used for financial reporting and search capabilities in Oracle. The Concur Invoice Number and Description fields will be expanded to include certain payee details.

The Lines Description fields will be expanded to include certain payee details.

Set your account settings to “Entered Currency” to ensure the UC Fair Work Fair Wage policy is applied. When performing work on a UC site, you need to be paid a minimum wage of $15/hour.

You may register for the next Training day on Thursday, February 25. The training will be held at 2:00 pm.

The training is intended for individuals who process transactions in Oracle Procurement and Concur. The demo will include justifications and consequences, and PI/PM notifications. The demo will be presented in a standard profit and loss statement format and includes the fund balance, and budget variance in a profit and loss statement format for the current fiscal period and YTD.

Please note that you can further search for Concur payment details (e.g. Concur Supplier Number, Payee Name) in Payment Compass. Additionally, we will be updating Knowledge Base instructions on how to look up past and subsequent invoices.

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What is the Process for Interlocation Transfers of Funds?

An Interlocation Transfer of Funds (ILTF) is a transfer between campuses or departments within the UC system. The objective is to support error correction of non-salary cost transfers. Target launch is February 18.

Oracle: Buying and Paying for PO Requisitioners

When users submit shopping carts in Oracle Procurement, a new popup will appear asking if the PO Requisitioner populated Project, Task, and Expenditure categories. This field has been added for visibility.

The invoice information provided will be used to determine if the PO Requisitioner populated the fields. The Information pop-up is designed to provide guidance to users on how to fill out the fields appropriately.

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