Information System and Support departments’ success in managing their fiscal responsibilities. Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial systems. Please refer to the monthly cost transfer report for a detailed view of financial transactions. For more information on mileage rates, please use the Concur (e.g. 2020) walkme browser extension KBA. If you do not have WalkMe installed, please refer to the walkme-enabled-for-payment compass guidance throughout Oracle. This technology has already been used to great effect in another product, and the same approach is planned for the future. January close delay update: This issue has been escalated with Oracle for resolution. Thank you for your patience.

Announcements
- **BI & Financial Reporting Series: Cost Transfer Panorama**
  - We invite you to attend a live webinar about Oracle cost transfers (post-2/18/21). The demo will focus on the Oracle Requester role and the Delegate role in Concur. The session will cover cost transfer justifications and consequences, and PI/PM notifications. The demo will also cover the tracking and auditing of cost transfers. The webinar is intended for individuals who process transactions in Oracle Procurement and Concur.
  - The webinar will cover all transfers’ status.
- **BI & Financial Reporting Series: Transaction Panorama**
  - Join the Oracle Functional Leads and the Oracle BI team as we dive into the new Transaction Panorama. Built on the power of Oracle data, this tool provides detailed transaction line-item information and original source data. It allows for more accurate projections and tracking of funds. Target launch 2/25.

Tips & Tricks
- **Type and Mileage Calculator in Concur.**
  - Attach a mileage log or Google Maps tracking to your travel expenses if you are reimbursed for mileage. This will ensure that you are reimbursed appropriately for your travel. For more information on claiming travel expenses, see our website.
- **Oracle Procurement Live Training Courses.**
  - Concur courses available this quarter.
  - Oracle Procurement courses available this quarter.
  - Oracle Financials Cloud courses available this quarter.
  - Oracle Financials Cloud courses available this quarter.

Hot Topics: Oracle Requester Role and Concur Delegates
- **Procurement Requisitions**
  - When users submit shopping carts in Oracle Procurement, a new popup will appear asking if the PO Requisitioner populated Project, Task and Expenditure Details. This ensures that all necessary information is populated.
- **Oracle Finance Cloud**
  - Paying for Financial Unit Approvers.
  - Oracle Finance Cloud remains the same.
- **Oracle SaaS Financials Cloud and Concur**
  - The Fair Work Fair Wage policy was implemented in January. This policy ensures that all employees are paid fairly and consistently. Please see our website for more information.
  - The Chancellor unit, a Division, School, Department or Project. The report is presented in a standard profit and loss statement format and includes the financial position at any given point in time.
  - Department reports now available include:
    - Department Financials
    - Department Reconciliation
    - Department Project Balances with Expenditure Details
  - Reconciliation reports needed to manage department financial activities and construct budgets.
  - YTD for the Accounting Period selected. Project report parameter is available, but no budget data for projects.
  - Chancellor Unit Account balances are presented in a standard profit and loss statement format and includes the financial position at any given point in time. Prior year’s carryforward is a beginning balance to provide the user a historical perspective.
  - Oracle Financials Cloud and Concur offer similar functionality. Watch this video to learn more!

Articles
- **January Close Delay Update**
  - This issue has been escalated with Oracle for resolution. Thank you for your patience.

New Features
- **Direct B2B**
  - Any requisition with associated services.
  - Allowable for Service requests.
  - Approval required for Requisitions.
  - These changes improve user experience. This technology has already been used to great effect in another product, and the same approach is planned for the future.

BI Quick Tips!
- **Where Are My Sub-Accounts?**
  - This new report is available at reports.ucsd.edu.
  - This report provides overall financial data for each sub-account.
  - Project report parameter is available, but no budget data for projects.
  - Reconciliation reports needed to manage department financial activities and construct budgets.
  - Click here to learn more.

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