March 16th, 2021 - 11th Edition
Budget & Finance Weekly Digest

University of California San Diego, 9500 Gilman Drive, La Jolla, CA, 92093

Information System and Support departments' success in managing their fiscal responsibilities.

For more information on approvers, check out our new Blink page on the Travel Policy Guide.

Learn how to purchase using the Punchouts in Oracle Procurement, and which Guide to Punchout Ordering.

How to Add POETAF to a Posted Payables Transaction

When a cost needs to be visible on a Project in PPM you must include a chart string. Visit reports.ucsd.edu for a walkthrough on how to do so.

A comprehensive review of the PPM project roles and their updated definitions for mapping in PPM is now available for campus users to help determine the correct attributes to use.

Oracle Financials Cloud Project Portfolio Management: General Project Request

Oracle PPM General Project Request is now available to campus users. The Oracle PPM General Project Request supports the general project roles that have been updated. This update will provide improved accuracy and flexibility in the financial management processes.

Adjusted to Tolerance Settings

IPPS is aware that some invoice payments are pending due to Oracle adjustments to tolerance settings. IPPS is actively working on adjusting these settings and running a three-month pilot to see how these modifications impacted invoice processing and payment time. Stay tuned for a future update on revised settings.

General Project Structure

A comprehensive review of the PPM project roles and their updated definitions for mapping in PPM is now available for campus users to help determine the correct attributes to use.

Oracle Financials Cloud

Oracle Financials Cloud provides a new breadth of capabilities for your financial management initiatives. We have recently implemented technology to allow our agents to answer calls from a remote working environment. Our lines are open from 8:00am - 4:00pm, Monday - Friday. You can also leave a voice message and our agents will return your call.

Phone Availability

General

Recorded Office Hours

FIS Implementation – Reviewing Key Issues and Assessing Solutions

Register for an upcoming webinar!

Monday, March 22, 2021 @ 9:00am

Town Hall on the Financial Information System implementation. Topics to be discussed are primarily focused on the impact of Oracle’s acquisition of PeopleSoft, however, it can be assumed that all financial processes will be impacted on some level. The Town Hall will provide an overview of the Financial Information System project and the purpose and expected outcomes for the Town Hall. The Town Hall will include interactive elements to encourage questions and feedback.

Register today and join the Travel team as they go over Concur Travel & Expense Report Customizations and More! Recorded Office Hours – Travel Policy Guide

3/18/21: Travel Policy Guide

Thursday, March 18, 2021 @ 11:00am - 12:00pm

Join the IPPS Team for the next session of Hot Topics! This session will focus on both travel and non-travel-related wire payments. Our instructors will review recent changes to wire payments across campus with an emphasis on the Financial Information System project. The slides will provide an overview of the payment structure and the associated changes. The team will also provide a live demonstration of the new features in the Faculty and Staff Finance center.

Wednesday, March 24, 2021 @ 11:00am - 12:00pm

Hot Topics: Wire Payments

No new reports.

Future updates will be listed in the next edition.

Supervisor Request Approvers

To add a supervisor approver for T&E Card Requests, applicants go to Profile Settings and select Default Approver 1 > Select Supervisor (first name and last name). A list of your available supervisors will appear. You can select your desired approver. If no approvers have been set up previously, you will need to contact Human Resources to ensure that the supervisor is correctly identified in the system.

If you have questions about this edition, the best way to contact our UCSD Travel: Before You Go office is to email us at travelpolicyguide@ucsd.edu or call us at 858-534-2288. You can also visit the travelpolicyguide.ucsd.edu website for additional guidance.

Subscribe to our email list.

For more information on the above topics, and where necessary information will continue to be available, watch Fund Management: General Project Structure. Additional enhancements to the system and business processes will be made. To ensure all campus users are aware of these changes, the Office of Financial Control will provide monthly updates in the Budget and Finance Weekly Digest.

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