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労務費計画週次情報

Budget & Finance Weekly Digest

The Travel team has recently updated their one-page Travel policy guide. This guide highlights the very basics of Travel policy and is a useful reference for departments and staff to understand the requirements and procedures.

Concur Approval

- Departments have the option of adding the appropriate Supervisor Approver to the Expense Report and T&E Card Request approval flows.
- To add a Supervisor Approver to the Expense Report approval flow, go to Profile Settings > Expense Request > Supervisor Approvers. In the first field, select “Default Approver 1” and then select the approver name from the list.
- To add a Supervisor Approver for T&E Card Requests, go to Request Approvers and select the approver name from the list.

Supervisor Approval first before entering the standard workflow.

Misc. Receipt Revenue No Longer Posting as a Negative Project Cost

- The Oracle Finance Cloud (OFC) Project Portfolio Management (PPM) system has been updated to ensure that all negative costs are reversed and will remain in the GL.
- Prior to the update, negative costs were posted as a negative Project Cost, which could cause issues with financial reporting and analysis.
- The update also includes additional enhancements to the system and business processes to improve accuracy and efficiency.

Tips & Tricks

- Oracle Financials Cloud: Visit reports.ucsd.edu for a list of available reports and how to access them.
- GHG Reporting: For a walkthrough on how to do so.
- Oracle PPM: Visit oracleppm.ucsd.edu for more information and resources.
- Fund Management: General Project Structure Options: Review the latest edition for an overview of PPM project roles and their updated definitions.
- Oracle PPM: Sponsored Project Request: Learn how to purchase using the Punchouts in Oracle Procurement, and which expenditure types are available.
- Oracle PPM: Showcase: How to Add POETAF to a Posted Payables Transaction: Understand the process for reclassifying a Payables transaction to make it visible on a Project.
- Oracle PPM: What’s Next in the Project Portfolio Management (PPM) Stack: Keep up to date with the latest developments and enhancements.
- Oracle PPM: Oracle PPM: Oracle PPM: How to Add POETAF to a Posted Payables Transaction: For more information on the above topics, and how necessary information will continue to be available, watch Fund Management: General Project Structure Options.

Misc. Receipt Revenue No Longer Posting as a Negative Project Cost

- A comprehensive review of the PPM project roles and their updated definitions has been underway. Alternatively, you can use these Services and Support tickets to request the removal of a Supervisor Approver or the addition of a new approver.
- A present need for a one-time mass-cleanup of project roles has been identified. This will include: key implementation issues and what have we learned, why did we go-forward, and what’s next in the Project Portfolio Management (PPM) Stack.
- For more information on the above topics, and how necessary information will continue to be available, watch Fund Management: General Project Structure Options.

Finance Information System implementation

- The Finance Information System implementation has been and remains difficult for faculty and staff. We want to invite you to a Town Hall on the Finance Information System implementation.
- The Town Hall will address campus inquiries and key topics that matter to fund managers. Watch the first webinar in the series to learn about General Project management tips and tricks, and how best to align resources & expenses for granular reporting.
- Monday, March 22, 2021 @ 9:00am - 10:00am (Repeat Wed, March 24, 2021 @ 11:00am - 12:00pm)
- For any questions related to Travel, Accounts Payable, or Procurement, feel free to reach out to the IPPS Solutions Team at 858-534-9494. We have a comprehensive list of frequently asked questions that covers a wide range of topics, and we are committed to providing fast and accurate answers.

Budgetary Reallocation

- To remove a Supervisor Approver, delete the approver’s name from the appropriate field in the Expense Report or T&E Card Request.
- To add a Supervisor Approver for T&E Card Requests, use the Services & Support tickets to request the addition of a new approver.

Data Stewardship

- For more information on the above topics, and how necessary information will continue to be available, watch Fund Management: General Project Structure Options.

Expense tips and travel policy guidance

- The next Travel Training day is Planning to Travel? Jet Over to the UC Learning Center!
- Employees/appointees with their Travel & Entertainment Card and claim the Department move coordinators pay for moving company invoices for new employees/appointees.
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