Submitting Documents

As a follow-up to last week's announcement on Submitting Documents, we would like to provide additional details on how to take advantage of this new functionality. Review our directions on how to take advantage of this new functionality.

Resolving Alerts in Concur

When viewing alerts in Concur, be sure to select the carrot symbol to the right of the Alert box to view specific information about the alert. Many alerts have the carrot symbol next to them, which means there is more information that can be viewed.

Travel Profiles

If you receive an alert related to a missing travel profile, please reach out to your departmental Travel Coordinator or a Balboa Travel agent. The likely cause is missing profile information. Concur requires a completed profile in order for you to make travel arrangements.

Recharge PO Commitments

Commitments associated with recharge POs (e.g. those with suppliers such as Store or Core Bio Services) are not lifted automatically within Oracle due to purchase agreements being rolled forward. Invoices, and Concur Travel/Event Requests create commitments in OFC. If an Unidentified PO is committed, or with a Balboa Travel agent, the likely cause is missing profile information.

Procurement & Payables

Invoices, and Concur Travel/Event Requests create commitments in OFC. Invoices, and Concur Travel/Event Requests create commitments in OFC. If you have a recharge transaction on your FinUnit Project DFLT (or another project in PPM). If you have a recharge transaction on your FinUnit Project DFLT (or another project in PPM). If you have a recharge transaction on your FinUnit Project DFLT (or another project in PPM).

Personnel Expense Projection Report

The purpose of this report is to forecast staffing expenses (salary, benefits, and expenses) that may change over time on a particular Project or Financial function. The report can be run by any level of the unit hierarchy, fund, and project level using General Ledger data. This list was curated specifically to support financial review and corrective actions by department fund managers.

Oracle Financials Cloud

Oracle Financials Cloud helps you to manage your budget with greater accuracy and control. The report can be run by any level of the unit hierarchy using General Ledger data. There is no corrective action needed from departments.

Oracle PPM General Project Request

Oracle PPM General Project Request is a tool designed to help departments manage their projects and take stock of what will need to be lifted for those projects that are closing. As fiscal close approaches, now is a good time to review commitments on your projects and make corrective actions. Invoices, and Concur Travel/Event Requests create commitments in OFC. If you have a recharge transaction on your FinUnit Project DFLT (or another project in PPM). If you have a recharge transaction on your FinUnit Project DFLT (or another project in PPM). If you have a recharge transaction on your FinUnit Project DFLT (or another project in PPM).

Getting Ready for Fiscal Close

As fiscal close approaches, now is a good time to review commitments on your projects and take stock of what will need to be lifted for those projects that are closing. The report can be run by any level of the unit hierarchy, fund, and project level using General Ledger data. There is no corrective action needed from departments.

New Blink Page

Two new reports have been added to this panorama:

- **Budget & Financial Management Reports Panorama**
  - **New Introduction to Oracle Procurement & Payables eCourse**
    - This course is designed for employees who have little to no experience with buying and paying for goods and services at UC San Diego. Instruction will involve an introduction to Oracle Procurement and Payables concepts. This course will be especially valuable for faculty and staff who travel or book business travel. The course is open to anyone who completes the UCPath to help track funds. Please see the “About this Report” button at the bottom of the report.
  - **Oracle Procurement & Payables Best Practices**
    - This course has recently been updated according to campus feedback to reflect the latest changes to Concur and Oracle Procurement and Payables. Instructors will be reviewing Oracle Procurement and Concur best practices in the course. More information about the course can be found on the course page.

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