responsibilities, identify their resources based on the following questions:

- What are the Funding Sources associated with the award?
- Are there any specific projects that are restricted in terms of expenditure types?
- Have any expenditures been made to the award?

The purpose of this voluntary survey is to gather feedback on CBO's current practice of allocating recurring resource allocations.

- Core Fund Resource Allocations Survey

What expenditure types are restricted on a given project or award and whether any expenditures have been made to the award.

New Exception Report Release:

- PBED Expenditure Details
- Project Panorama: All Transactions
- GL Transaction Details
- Project Cost Transaction Details

The report also identifies high-risk and potentially fraudulent transactions.

Upcoming Report Release:

- Invalid Login Response
- Unable to Load Requested View

Concur, Balboa, and Kahala.

Wednesday, May 25, 2022

Travel Booking

Tuesday, May 17, 2022

- Requisition Reminder Emails Turned Off

We received notice that some approvers were receiving erroneous reminders about requisitions pending their approval even though the requisition was not pending.

- Requisition Reminder Emails Turned Off

Tuesday, May 10, 2022

- Resource Management Office Hours

Please note the changes to resource management office hours.

New Procurement and Payables Emails

As of May 9, 2022, the emails which suppliers may use to create Services & Support tickets for procurement and payables will be changing.

The email for procurement emails will be changing from support.framework@ipa.ucsb.edu to support.framework@ipa.ucsb.edu.

The email for payables emails will be changing from support.framework@ipa.ucsb.edu to support.framework@ipa.ucsb.edu.

Oracle: Buying and Paying for PO Requisitioners

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as requisitioning, processing nonPO payments, and checking invoice status.

New Exceptions Report Release:

- High-risk Ledger Review:
  - Eliminate or isolate transactions that have been cost transferred off of a project in PPM.
  - Identify transactions on projects associated with any person role.

Concur cash advance that are assigned to travelers with trips that have not been completed or reconciled.

AP invoices in Oracle by the AP June ledger cutoff date of 07/08/22.

Following these steps:

- Navigate to the Travel/Event Request screen.
- Click on the “Requisition” button.
- Select the project(s) associated with the request.
- Enter the fund source(s) associated with the project(s).
- Submit the requisition.

Each Tuesday, the Weekly Digest provides important updates related to procurement and financial reporting.

- Latest Report Releases
-校园预算办公室更新
- Tip & Tricks
- Take the Survey!