For further troubleshooting assistance on COA/POETAF errors, please refer to our support documents. Note that transaction dates for University Card transactions cannot be changed. For instance, transactions dated 09/30/2021 cannot be reconciled with a project or change the transaction dates of the expenses in the Expense Report.

Project Start and End Dates

It is crucial to ensure that the project dates are correctly entered in the Expense Report. Projects must have a start date of 10/01/2021. Transactions that do not fall within the project dates may not be properly reconciled. This rule applies to all transactions, including those with an Expenditure Item (EI) date prior to 07/1/2020. The reconciliation and allocation processes in Oracle PPM may not automatically adjust for such transactions.

To address this issue, the Sponsored Projects Finance (SPF) division has been reconciling indirect costs for all sponsored projects associated with the project start date of 10/01/2021. This includes projects with EI dates prior to 07/1/2020. The reconciliation and allocation processes in Oracle PPM will be updated to reflect these changes.

Sponsored Projects Finance Reconciliation

The SPF division has been manually assessing indirect costs for sponsored projects with an EI date of 05/10/2021 or earlier. This reconciliation and allocation process is necessary to ensure accurate financial reporting. The indirect costs will be allocated to the appropriate projects based on the project start date.

Current and prospective cardholders will learn about updates to the card program. This course is recommended for individuals responsible for those who manage sponsored projects. It will cover the regulations, control processes, and financial management of sponsored projects. The course will provide practical guidance on how to apply these regulations to your specific project.

For your convenience, we have created quick guides for our new Oracle Procurement Live Course Guides. These guides will help you navigate the course material and prepare for the live sessions. They will also include hands-on instruction on the use of Oracle Procurement & Payables. The course will cover the following topics:

- Introduction to Oracle Procurement & Payables
- PO Requisitioner
- PO Approver
- PO Payee
- Oracle Financial Unit Approver
- University Procurement Card Program
- Procure-to-Pay (P2P) Operations
- Reconciling Transactions
- Fund Management Office Hours
- Fund Management Office Hours
- Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense.

We hope you find these resources helpful in advancing your knowledge and skills in Oracle Procurement & Payables. Please check back for future updates and new courses.

Tips & Tricks

- When filling out the Expense Report, make sure to include all necessary supporting documentation, such as invoices, receipts, and purchase orders. This will facilitate the reconciliation process and ensure accurate financial reporting.
- If you need to submit a S&S ticket, refer to our support documents for detailed guidance. Our support team is available to assist you with any troubleshooting issues you may encounter.
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