Anchoring the Delivery of the Weekly Digest

May 4th, 2021 - 18th Edition

Announcements

Oracle Financials Cloud

Begin einem Ablauf

The bug has been fixed and published on the Oracle Financials Cloud. The platform has been updated following the bug fixing. This will continue to roll-back when the platform is stable. Check out more on bug fixing status by visiting the Oracle Financials Cloud.

Getting Ready for Fiscal Close

We'll be sending a new section to the Weekly Digest to help you prepare for Fiscal Close.

- Cancel your Rejected Requisitions
  When a requisition is rejected, it will remain in your PPM ledger. The individual who submitted the requisition can be contacted by calling the requisition number for the requisition to be reviewed and corrected.

- Submit Your Concur Documents
  A summary of the current and upcoming deadlines can be found in the Concur: Events & Expense calendar. Remember that the deadline for submitting Concur documents must be met to avoid delays in the closing process.

- University Procurement Card Program
  Tuesday, May 11, 2021 @ 1:30pm - 4:00pm
  The course will cover the importance of understanding the changes to the University Procurement Card Program. The new rules will go into effect for cardholder payments on June 1, 2021. Attendees will learn about the changes and how to ensure compliance.

- Travel & Expense Live Training Classes
  These live training sessions will cover the basics of travel and expense reporting. Each Tuesday important updates related to travel and expense are delivered to your inbox. Our goal is to deliver timely information that matters to you.

Tips & Tricks

Oracle Financials Cloud

- Reviewing and Canceling Purchase Orders
  Refer to our new KBA for instructions on canceling a PO. For instructions on processing change orders on your orders, you may refer to the Revising and Canceling Purchase Orders KBA.

- Submitting Group Travel Expense Reports
  Only expenses incurred by the group leader should be claimed on the Group Travel Expense Report. Remember that users and their delegates will reconcile Group Travel in Concur. The team will focus on fiscal close activities.

Concur Travel & Expense

- University Procurement Card Program
  Tuesday, May 11, 2021 @ 1:30pm - 4:00pm
  The course will include more in-depth explanations of changes to the University Procurement Card Program. The team will focus on fiscal close activities.

- Submit Your Concur Documents
  The new courses: UC San Diego Travel: Before You Go, and UC San Diego Travel: Reporting Expenses, are delivered to your inbox. Our goal is to deliver timely information that matters to you.

- University Procurement Card Transactions:
  Procurement Card Transactions: the requisition can be lifted by the requisitioner if the requisition is not in the process of being processed. Requisitions in the PPM ledger will persist even if the requisition is lifted. When a requisition is rejected, its commitment will persist in your PPM ledger. If you would like to cancel a requisition not belonging to you, you must first go to the requisition, click the requisition number, then click the requisition number, and finally click the cancel requisition button.

- Concur: Event and Expense calendar
  Upcoming webinars and events are listed in the Concur: Event and Expense calendar. The team will be focused on fiscal close activities.

- Travel: Reporting Expenses
  There will be a pause in June for the courses: Travel & Expense Live Training Classes. Spots are still available for the May courses. The team will resume training in the new fiscal year. Spots are still available for May courses.

- Oracle Financials Cloud
  The team will resume training in the new fiscal year. Spots are still available for May courses. The team will focus on fiscal close activities.

- ISIS Student Billing
  Departmental advisor staff are encouraged to take charge of charges to be reflected on the student account/June ledger. The team will cover the process for card requests and card transaction reconciliation via Concur. This is not an introductory course. Participants should first complete the associated prerequisites listed below. For instructions on canceling a PO, you may refer to the How to Cancel a Purchase Order in Oracle Procurement KBA. For instructions on processing change orders on your orders, you may refer to the Revising and Canceling Purchase Orders KBA.

- Submit Your Concur Documents
  The team will focus on fiscal close activities.

Oracle Financials Cloud

- How to Check the Status of a Concur Request and Expense
  You can check the status of a Concur request and expense report by visiting the Concur: Event and Expense calendar. The team will focus on fiscal close activities.

- How to Submit a PO Change Order in Oracle Procurement
  Remember to call the Account & Card Management team for all your questions and requests.

- How to Submit a Request in Oracle Procurement
  The team is via support.ucsd.edu. Have questions about this edition? The best way to contact our Training & Support team is via support.ucsd.edu. Have questions about this edition? The best way to contact our Training & Support team is via support.ucsd.edu.

About the Weekly Digest

Every Tuesday important updates related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense, are delivered to your inbox. Our goal is to deliver timely information that matters to you.

Contact us

Have questions about this edition? The best way to contact our Training & Support team is via support.ucsd.edu.