Each travel arranger that can book should show as “Can Book Travel? Yes” on the traveler’s profile. Concur Travel Arranger Settings include transactions that posted to a fund not associated with the project or a financial unit other than the financial unit associated with the project in the chartstring. A future release of this report will have a new report on the Department Exceptions Panorama that identifies transactions in the General Ledger that have posted to a fund, or have been centrally closed or will not be centrally closed.

New Report Release: Resources:

We are excited to announce the release of the Contract Management Dashboard, which will help fund managers and fiscal officers manage contracts by allowing them to view contract details and associated project information, and to track the status of contract amendments. This new dashboard will also include a feature that allows users to search for contracts and projects based on specific criteria, such as contract expiration date or project location.


At next week’s office hours, there will be a demo of the newly released Contract Management Dashboard. Come to this week’s Fund Management Office Hours to see a live demo of the dashboard and ask questions about the newly released features. Every Thursday @ 11:00am - 12:00pm.

New Report Release: Project Setup to GL Match Errors

This virtual training is set to occur every 2nd (second) Tuesday of the month at 10:00am, starting on 7/12 at 10:00am.

New Report Release: PPM Contract and Invoice Training

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as award contracts and associated projects, and processing nonPO payments and checking invoice status. This course will be especially valuable for individuals responsible for contract management. Thursday, July 7, 2022 @ 9:00am - 11:00am.

Announcements:

Some of the projects with missing project managers had May-22 payroll that went to DFLT. These transactions have now been centrally closed. Further analysis was done on the projects and the following actions will now be taken:

- Any of the converted projects with no activity, or had activity in 2020 and a current PPM balance of $0, will be centrally closed.
- Any project that was closed in May due to inactivity, will be manually reopened.
- Any of the projects that were still in use, so the projects that were closed had to be reopened.
- In January, we communicated that projects converted with inactive indexes would be closed. Then, in May, we realized some of the projects were still in use, so the projects that were closed had to be reopened.
- The Transactions Details report allow you to search by both periods. For more information, view the prior Digest edition from 03/09/21.

Recent accounting period instead of the Original accounting period when looking in PPM Manage Project Costs. Most Oracle PPM users will see an error reading “Accounting Period in Manage Project Costs” when they try to record a transaction against a project. Please note that this change is an update from Oracle and is not a problem within the PPM system. It may create more costs with a Most Recent accounting period in Manage Project Costs.


This report will provide a step-by-step guide on how to use the various features of the PPM system. It will cover topics such as awarding contracts, managing projects, and creating invoices. This report will be especially valuable for individuals who are new to the PPM system and want to learn more about its capabilities.

New Report Release: Where can I

This report will provide a list of projects and associated contracts. It will also include information on the type of project and the amount of funding for each.

New Report Release: Award contracts and associated projects

This report will provide a list of all award contracts and associated projects. It will include information on the type of contract, the amount of funding, and the project location.

New Report Release: Receipt Details

This report will provide a detailed receipt information for receipts applied to OFC invoices. It will include information on the receipt number and the amount.

Have Finance-related questions? Call the UC San Diego Finance Help Line:

1-855-230-4237

Tuesday, Thursday | Website: UC San Diego | OCFO | UCSD

Tips & Tricks:

Billable Timeframe

Oracle: Buying and Paying for PO

This course will include an overview of the purchasing process, including creating procurement orders, receiving goods, and paying suppliers. It will also cover topics such as invoice processing and reverse logistics. Thursday, July 7, 2022 @ 9:00am - 11:00am.

How do I

Register for this comprehensive training course providing instruction on contract, event, and invoice creation and processing. This course is designed for individuals who are responsible for managing contracts and events, and will cover topics such as creating contracts, managing events, and processing invoices. This course will be especially valuable for individuals who work in finance or procurement.

How do I

This course will cover topics such as creating contracts, managing events, and processing invoices. It will be especially valuable for individuals who work in finance or procurement.

How do I

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as award contracts and associated projects, and processing nonPO payments and checking invoice status. This course will be especially valuable for individuals responsible for contract management. Thursday, July 7, 2022 @ 9:00am - 11:00am.

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Details about an event you've registered for:

Event Calendar

Be sure to try out the different calendar views in the upper right corner! Visit Our Website