Accounting & Financial Support

- Concur Travel & Expense
- Oracle Financials Cloud
- Budget & Finance

New Report Releases:

- New report releases including a Fund Management Office Hours report will be on Tuesday, July 12, at 10:00am.

PPM Contract and Invoice Training

- This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, closing POs, and invoice numbers and COA+POET information.

Introduction to Oracle Procurement & Payables eCourse

- This course is designed to help the Budget & Finance community, including faculty or staff with financial responsibilities, identify their resources based on the following questions:
  - What can I do to learn about all there is to know about budget & finance?
  - Who can get help?
  - What resources are needed to handle a specific task or question?

- We have received reports that some travel arrangers have lost the ability to book travel on behalf of certain employees. The simple fix is to have the traveler update their arranger settings in Concur. Each travel arranger that can book should show as “Can Book Travel? Yes” on the traveler’s profile.

- We are excited to announce the release of the Contract Management Dashboard, which will help fund managers and fiscal managers track the lifecycle of the contracts along with payment and chartstring information.

- We have determined that some transactions posted to a fund not associated with the project.

- The IPPS Accountability and Tax team is working hard to process all cost transfer requests as quickly as possible. The team discovered some projects with missing project managers had May-22 payroll that went to DFLT. These transactions have now been reclassified to the correct project. Further analysis was done on the projects and the following actions will now be taken:
  - Any projects that had activity in 2020 and a current PPM balance, or any activity in 2021 or 2022, will be centrally closed.
  - Any of the converted projects with no activity, or had activity in 2020 and a current PPM balance of $0, will be reclosed.
  - Projects that were closed by request between January and June will be reclosed.

- New reports have been released on the Business Analytics Hub, such as the General Contract and Project Summary report which provides summarized funding, revenue, invoice, and payment amounts for each contract and project. For more information, see the BI & Financial Reporting Best Practices section.

- Additional details are available at the Finance-related questions link.

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