


# Budget & Finance Weekly Digest

January 5, 2021- 1st Edition

## Welcome to the first edition of the Budget & Finance Weekly Digest




With the integration of the IPPS Weekly Digest and Budget & Finance Announcements publications, readers will now receive a single consolidated weekly message.

The digest will go out to subscribers each Tuesday and include important Announcements, Training & Support, BI & Financial Reporting Updates, and Tips & Tricks related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense. **Our goal is to deliver timely information that matters to you.**

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## Announcements

**New Feature: Oracle PPM Cost Transfer is Live**
A cost (expense) transfer occurs when expenses are moved from one accounting distribution to another after they have been recorded in Oracle Financials (OFC). The new Oracle PPM cost transfer functionality will allow users to initiate transfers for transactions from Project to Project, Single Project from one Task to another Task, Single Project from one funding source to another, and Non-Projects to Projects and vice versa.

The following resources are available for you to learn the new cost transfer process:

- Watch the recorded University Cost Transfer training and review the training FAQs

- Attend office hours for cost transfer support

**Concur Requests Pending Inactivation**
As a reminder, please **do not click Cancel Request** when you no longer need the Request (i.e. Travel) as it creates duplicate commitments.

Upon further review, it has also been determined that the **Close/Inactivate Request** button is not working properly. As we work to resolve this issue, the Close/Inactivate Request button has been removed from the Request form.

In the meantime, please leave those Requests open and submit a Services & Support case to Travel & Expense if you have questions.

**Update on Payables Ledger Discrepancies**
IPPS is happy to report that the affected transactions related to Concur human subject payments and gift cards that posted to the GL but not PPM, have been corrected. Campus clients that have impacted transactions will be notified directly, but no additional action is required to correct the errors. As reported last year, the root cause, related to a technical integration that posted these requests to the GL and not in PPM, was fixed. IPPS is continuing to work on the remaining three payables ledger discrepancies.

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## Training & Support



**Paid for supplies or a business event meal?**
Learn how to get reimbursed. Register for next week's instructor-led class Concur: Event and Expense Reimbursements

**What are common purchases on the P-Card?**
Listen as the team goes over the University Procurement Card Program

**Fourth Thursday with Travel!**
Register for an upcoming travel training: UC San Diego Travel: Before You Go & UC San Diego Travel: Reporting Expenses

**Buying and Paying**
New instances of Oracle: Buying and Paying for PO Requisitioners & Oracle: Buying and Paying for Financial Unit Approvers have been posted in the UC Learning Center for 2021.

**Reminder about IPPS Training Decision tree**

Refer to the new IPPS Training Decision Tree PDF for guidance on the various training opportunities available from IPPS, whether you're new or looking for additional training resources on Oracle Procurement, Oracle Accounts Payable, and Concur Travel & Expense.

**Training & Events**

Bookmark the Training & Events Calendar to track upcoming training, read course descriptions, and register for events!

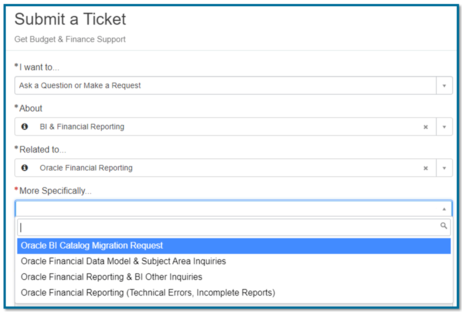
View all Budget & Finance Training Courses to determine what's right for you.

**Office Hours are here to support you!**

New 2021 Office Hours have been posted! In addition, subject matter experts are leading two new series: BI & Financial Reporting for authors and consumers and Cost Transfers.

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## BI & Financial Reporting Updates




**New Service Offering for Oracle BI & Financial Reporting**

For general Oracle report support, suggestions or enhancement requests, please submit a ticket and our developers will check the feasibility of the enhancement.

**Issue with Oracle Production Reports**

Production OFC reports may fail due to timeout errors. We are actively working with Oracle support to resolve the issue. We apologize for the inconvenience and appreciate your patience as we work on the solution.

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial information system and support departments' success in managing their fiscal responsibilities.
Find answers, request services, or get help from our team at the UC San Diego Services & Support portal.

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