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

With the integration of the IPPS Weekly Digest and Budget & Finance Announcements, publications will now be consolidated into 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.

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 ProjectRequests to 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 Oracle PPM Cost Transfer training and review the Training Video
- Access the Oracle PPM Cost transfer support

Concur Requests Pending Invocation

As a reminder, please do not click Cancel Request when you no longer want 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 now 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 related effects transactions related to Concur honor purchase and gift card purchases that posted to the GL, but not in PPM, have been corrected. Campus clients that have imported transactions will be notified directly via email. A 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 remaining three payables ledger discrepancies.

Training & Support

Paid for supplies or a business event meal? Learn how to get reimbursed. Register for next week’s instructor-led class University Expense Reimbursement.

What are common purchases on the P-Card? Listen as the team goes over the University Expense Reimbursement.

Fourth Thursday with Travel

Register for an upcoming Travel training: UC San Diego Travel Before You Go. A UC-EDX travel training is available in English and Spanish.

Buying and Paying

New Interview of Oracle Buying and Paying and the GL Reconciliation and @Concur Buying and Paying for Financial Reporting updates have been posted in the UC Learning Center for 2021.

Reminder about PPS Training Decision Tree

Refer to the new PPS Training Decision Tree to determine what's right for you. The training decision tree provides guidance on the various training options available if you’re looking for additional training resources on Oracle Procurement, Oracle Accounts Payable, and Concur Travel & Expense.

Training & Events

Bookmark the Training & Events Training Calendar to track upcoming training, read course descriptions, and register for events. View all Budget & Finance Training Events.

Office Hours are here to support you!

New 2021 OfficeHours have been posted: In addition, subject matter experts are on hand the first Thursday every month from 11am to 12pm. A special office hour on Oracle B&F Reporting is available for authors and consumers and Cost Transfer.

BI & Financial Reporting Updates

New Service Offering for Oracle B&F Financial Reporting

For general Oracle B&F support questions, suggestions or enhancement requests, please submit an Oracle B&F Support request. Our developers will check the feasibility of the enhancement.

Issue with Oracle Product Revisions

Product OSC reports may fail due to timeout errors. We are actively working with Oracle support to resolve the issue. We appreciate your patience as we work on the solution.

Oracle: Buying and Paying for Financial Unit Approvers

New instances of the Oracle: Buying and Paying for PO Requisitioners training FAQs are available. View the Buying and Paying for PO Requisitioners training FAQs.

Oracle: Buying and Paying for PO Expensify

New instance of the Oracle: Buying and Paying for PO Expensify training FAQs are available. View the Oracle: Buying and Paying for PO Expensify training FAQs.

Oracle: Buying and Paying for PO Smith

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Oracle: Buying and Paying for PO Travel

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Oracle: Buying and Paying for PO University Procurement Card Program

New instance of the Oracle: Buying and Paying for PO University Procurement Card Program training FAQs are available. View the Oracle: Buying and Paying for PO University Procurement Card Program training FAQs.

Oracle: Buying and Paying for PO University Travel: Reporting Expenses

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