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 be consolidated into one comprehensive 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 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 Projects to Projects, Single Project from one Task to another Task, Single Project/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 Training Cost Transfer Training and review the Video Guide
- Access User Guide for cost transfer support

Concur Requests Pending Inactivation

As a reminder, please do not click Concur-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 are working 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 posted to the GL, but not in PPM have been corrected. Campus clients that have improved 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.

Training & Support

Paid for services or a business event meal? Learn how to get reimbursed. Register for next week’s webinar on Concur Expense Reimbursement.

What are common purchases on the P-Card? Listen as the team goes over the Unofficial Procurement Card Practices.

Fourth Thursday with Travel!

Register for an upcoming travel training. UC San Diego Travel Before You Go: A UC San Diego Travel Advisor’s & Engineers Guide.

Buying and Paying

New interview of Oracle Buying and Paying and Fans of the Rule Guidebook: "Oracle Buying and Paying for Financial Professionals" have been posted in the UC Learning Center for 2021.

Reminder about IPPS Training Decisions Tree

Refer to the new Training Decisions Tree for guidance on the various training options available from IPPS, whether you’re new to the training or need additional training on a specific topic.

Training & Events

Bookmark the Training & Events Training to stay up to date on the latest training opportunities available from IPPS, whether you’re new to the training or need additional training on a specific topic. IPPS is continuing to work on the remaining three payables ledger discrepancies.

Bi & Financial Reporting Updates

New Service Offering for Oracle BI & Financial Reporting

For general Oracle BI & Financial Reporting support, suggestions or enhancement requests, please submit a Service Request and our developers will check the feasibility of the enhancement.

Issue with Oracle Production Reports

Production ORC reports have been experiencing serious errors. We are actively working with Oracle supports to resolve this issue. We apologize for the inconvenience and appreciate your patience as we work on the solution.

Budget & Finance Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial and appreciation your patience as we work on the solution.

Oracle Procurement, Oracle Accounts Payable, and Concur Travel & Expense. Additional training resources on Oracle Procurement, Oracle Accounts Payable, and Concur Travel & Expense are available from IPPS, whether you’re new or looking for additional training opportunities available from IPPS, whether you’re new to the training or need additional training on a specific topic. IPPS is happy to report that the affected transactions related to Concur human subject payments and gift cards posted to the GL, but not in PPM have been corrected. Campus clients that have improved 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.

Oracle: Buying and Paying for PO Requisitioners

New instances of Buying and Paying for PO Requisitioners have been posted in the UC Learning Center for 2021.

Oracle: Buying and Paying for Financial Unit Approvers

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