January 5, 2021 - 1st Edition

Budget & Finance Weekly Digest

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.

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 Projects to Project, Single Project from one Task to another Task, Single Project to multiple funding sources 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 Cost Transfer training and review the Getting Started" video
- Access the help for cost transfer support

Concur Requests Pending Inactivation

As a reminder, please do not click Cancel Request when you no longer require the Request (i.e. Travel) as it creates duplicate commitments.

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

In the meantime, please lease 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 transactions affected to Concur human subject payments and gift cards posted to the GL but not in PPM have been corrected. Campus clients that have incurred transactions that have not yet been corrected should notify their accounting department.

If you have any questions, please submit a ticket to our developers.

Reminder about IPPS Training Decision tree

For full details on the Training Decision tree, refer to the new IPPS Training Decision trees available in the UC Learning Center.

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New Service Offering for Oracle BI & Financial Reporting Training & Support

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

Issue with Oracle Production Reports

New instances of Oracle: Buying and Paying for Financial Unit Approvers have been posted in the IPPS Training Decision Tree PDF for guidance on the various training options 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

Announcements:

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Budget & Finance Support provides training, testing, and communications to help fulfill all of the financial and administrative needs of the University. We design, develop, and deliver courses, training simulations, and other learning resources to provide a comprehensive learning experience that empowers students, faculty, and staff. Feedback is always appreciated; please get in touch with our team at San_Diego_Budget_Finance@ucsd.edu.