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 receive a 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 (OCF). The new Oracle PPM cost transfers capability will allow users to initiate transfers for transactions from Project to Project, Single Project from one Task to another Task, Single Project transfers 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 (View Cost Transfer training and review the) Video Guide
- Access the User Guide 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, I have also 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 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 identified transactions that will be notified directly from the original solution 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 supplies or a business event meal? Learn how to get reimbursed. Register for the next week’s instructor-led class.

What are common purchases on the P-Card? List as you go over the (View Event/Financial Reporting for authors and) Office Hours.

October Thursday with Travel!

Register for an upcoming travel training:
- UC San Diego Travel Workshop: Before You Go
- UC East Bay Travel Workshop: In Progress

Buying and Paying

New Interviews: Oracle Buying and Paying for the Oracle: Buying and Paying for Financial Unit Approvers.

Reminder about IPPS Training Decision Tree

Refer to the IPPS Training Decision Tree 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

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

View all Budget & Finance Training Calendar to determine what’s right for you.

Office Hours are here to support you!

Now 2021 Office Hours have been posted. In addition, subject matter experts are leading the new Bi & Financial Reporting training for authors and consumers and Cost Translators.

Bill & Financial Reporting Updates

New Service Offering for Oracle Bi & Financial Reporting

For specific Oracle Bi & Financial Reporting support, suggestions or enhancement requests, please submit a Service Request. Our developers will check the feasibility of the enhancement.

Issue with Oracle Production Reports

Production ORC reports are not printing for numerous reasons. We are actively working with Oracle supports resolve this issue. We apologize for the inconvenience and appreciate your patience as we work on the solution.

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