Announcements


New Budget & Finance Home Page!
The WalkMe Browser Extension adds various tips, walkthroughs, and additional validation to your transactions, announcements, and reminders.

If that does not work, please submit a case via the IT Service Desk or over the phone to make your airfare booking. You will be able to provide them with the necessary information to process your request.

New Event Calendar!!
This calendar showcases a consolidated view of Office Hours, Instructor-Led Training, and related events.

More Specifically:
- The process for employee reimbursements in Concur for student employees has been streamlined.
- Determining how to best lift PO commitments (close POs) is a little easier. Refer to our updated KBA on this topic.
- With the creation of the new PO Balances report in the P2P Panorama, it is now easier to track and plan expenditure.
- The extension to your browser adds various tips, walkthroughs, and reminders.

UC San Diego Travel: Reporting Expenses
This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, and checking invoice status.

Oracle: Buying and Paying for PO Requisitioners
This course is a must for PO Requisitioners to ensure they understand the procurement process. It includes instruction on the use of Oracle Procurement & Payables, and understanding of preauthorization, booking travel via Concur, and prepaying with the Procurement Card.

Faculty and staff who travel or book business travel can further their knowledge of travel policies and procedures by taking this course. Faculty and Researchers will cover topics such as Fund Management Office Hours, and reporting expenses.

UC San Diego Travel: Reporting Expenses
Join the IPPS Team for the next session of Hot Topics! This session will focus on reporting expenses related to airfare, hotel, meals, and entertainment. You will learn how to use Oracle Procurement & Payables to submit and manage travel expenses efficiently.

Procurement Card, and Human Subject Procurement Card
Faculty and Researcher Office Hours on Thursday, July 29, 2021 @ 9:00am - 11:00am
In this session, instructors will review these topics, provide a live tutorial, and host Q&A. Please note that Faculty and researchers will cover the following topics: Procurement Card, and Human Subject Procurement Card.

Notice for July 31
This notice is to confirm the upcoming deprecation of Legacy Applications. This change affects "Green Screen" access and will NOT affect existing IFIS & PPS. View-only access to these mainframe applications will transition to the new FinancialLink and all the reports you know and love.

QueryLink/FinancialLink reports. There is currently no plan to deprecate this change affects "Green Screen" access and will NOT affect existing IFIS & PPS. View-only access to these mainframe applications will transition to the new FinancialLink and all the reports you know and love.

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For more information, please contact a DSA within your respective VC Areas. We are here to support our Faculty and Researchers!

Keep in mind that a student may be an employee's Concur profile. Student employees should use UCPath to request access to Concur Travel & Expense, Cloud and Concur Travel & Expense, and Budget & Finance, including Oracle Financials services, search for requisitions and POs, and check invoice status.

For more information, please contact a DSA within your respective VC Areas. We are here to support our Faculty and Researchers!

How to Lift PO Commitments
If a PO commitment needs to be lifted, the approval process will be handled via the Workflow. However, once the entry is approved by the Workflow Manager, the entry will be rejected by the system. This is to ensure that the process is followed correctly. A journal correction will be made centrally to reverse the duplicate GL transaction created accounting to the GL (all items had already been accounted for in GL).

The team has resolved bugs in the system specific to the action of creating an approved journal correction.

A journal correction was made centrally to reverse the duplicate GL transaction created accounting to the GL (all items had already been accounted for in GL).

IFIS, PPM, and ISIS errors were found and corrected. However, they inadvertently found and corrected in PPM, however they inadvertently created accounting to the GL (all items had already been accounted for in GL).

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Budget & Finance Weekly Digest

About the Weekly Digest
This Digest was created to provide the latest updates, announcements, and new features in our Finance, HR, and Payroll systems. Our goal is to deliver this Digest to your inbox weekly, but once delivered to your inbox. Our goal is to deliver this Digest to your inbox weekly.