Budget & Finance Weekly Digest

University of California San Diego, 9500 Gilman Drive, La Jolla, CA, 92093

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Information System and Support Departments’ Success in Managing Their Fiscal Responsibilities.

We have found that communication is key to the success of our financial systems. Here are some tips and tricks to help you get started:

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial management system. We are committed to helping you achieve your goals.

Viewing Allocations

Concur Travel & Expense

Tips & Tricks

Planning to Travel? Jet Over to the UC Learning Center!

Join us for the third webinar in a series to learn more about the General Ledger.

Fund Management: General Ledger

Commonly used PPM reports.

Monday, March 29, 2021 @ 9:00am - 10:30am

Best practices, provide a live demonstration, and host a Q&A session.

Wednesday, March 24, 2021 @ 11:00am - 12:00pm

Hot Topics: Wire Payments

During the event we mentioned a survey we will be conducting in March/April. If you weren’t able to join us yesterday, please continue to provide your feedback via the survey and by reaching out to budget-ft@ucsd.edu. We will respond to any questions and concerns you may have.

Thank you for attending the Concur Invoice Number and Lines Description.

Last month, we launched the new Concur Invoice Number and Lines Description. Now we have further enhanced the Lines Description to include:

- New PO Supplier Email
- Supplier Name of the card purchase

In addition, we have added a new item to the Concur Invoice Number and Lines Description. This item allows you to indicate whether the invoice is a one-time payment or part of a recurring payment.

Our teams continue to work diligently to transfer more identifiable Concur information for better reporting and search parameters in Oracle.

Oracle Release 21A - Campus Notification

We are sending out a notice to all Project Managers about this change, and we recommend that you review the notice to ensure you are aware of the changes.

We will continue to evaluate invoice tolerance settings to ensure we are balancing risk with efficiency. Communication will be sent with more detailed information about the invoices that were paid as a result of this one-time release. We will also work with the supplier on your behalf.

Adjustments to Payables Invoice Tolerance Settings

After months of shared frustration, IPPS made the business decision to release invoices on a weekly basis, starting this week.

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Oracle Financials Cloud

Announcements

Jena Ackerman

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