Tips & Tricks

- Need a subtotal? Simply click on the column you want to subtotal, right click and Add Subtotal - save that as your default customization and your view of the report will include a subtotal. Click here to watch a demo.

- If you haven’t used the PPM budget feature before, we strongly encourage you to take our fund management training on Budgets. These trainings cover common PPM and GL reports, workflow, commonly used GL reports, and more!

- Join us for the second webinar in a series of fund management training to learn more about the General Ledger. Monday, March 29, 2021 @ 9:00am - 10:30am.

- Join the IPPS Team for the next session of Hot Topics! This session will focus on both travel and non-travel-related wire payments. Our instructors will review best practices, provide a live demonstration, and host a Q&A session. Register today and join the Travel team as they go over Concur Travel & Expense workflow, commonly used GL reports, and more!

- Join us for the third webinar in a series to learn more about the General Ledger. Wednesday, March 31, 2021@ 9:00am - 10:30am.

- Planning to Travel? Jet Over to the UC Learning Center! Please note that you can also search “Concur” in the UC Learning Center to browse through instructor-led Concur courses.

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

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**Budget & Finance Weekly Digest**

**Summary**

- When suppliers are added into Oracle Procurement to receive Purchase Orders (POs) in our systems, a notification is sent via email that includes the Vendor Name of the card purchase (if known) and an Invoice ID (if known). The total breakdown of the allocations can be found here alongside Allocation Summary.

- Please note that Project Managers will receive an automated email whenever project budgets you submit in the past week are entered or adjusted on their Projects and Tasks. This notification is overlaid on the weekly digest email so you can refer to the digest for any important updates/the latest activities for your department.

- You can start seeing these changes for Concur documents approved as of 3/18. To learn more about PPM budgets for general projects, and an in-system tutorial, visit the Fund Management: General Project Structure Options.

- We recently released the Employees can now enter Project PPM budgets from their charts directly, and those values will be held. Before making any budget adjustments! We initially requested that users that want to use PPM budgets for general projects hold off on submitting budgets until the approval workflow was disabled around April 9. Understanding that users would like to begin entering Project PPM budgets now, we have made additional resources available to approve general projects budgets. This notification was sent out to all general project managers in the past week and is also available via the IPPS Helpdesk.

- If you weren’t able to join us yesterday, review our Key Issues and Assessing Solutions Town Hall. Thank you for attending the Reviewing Key Issues and Assessing Solutions Town Hall on March 22. If you have any questions, please continue to provide your feedback via the survey and by reaching out to the IPPS Team.

- Dear all, IPPS staff strongly encourage departments to send something out to their faculty directly. Although we haven’t been sending out a notice to all Project Managers about this change, and we notified the premises through our local business offices. Support teams will notify project managers as they receive inquiries and report them to the appropriate department.

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**Practical Information**

**Hot Topics: Wire Payments**

- Based on our research, we do not think we released invoices where the billed amount matched the total amount of the purchase order. As a result of this, invoices that were on hold due to invoice tolerance settings comparing line-item amounts to the total were released to the pay state.

- Adjustments to Payables Invoice Tolerance Settings

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**Announcements**

**Grants Cloud**

- Adjustments to Fund Management System (FMS) 

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**BI & Financial Reporting**

- We have released an update to the FPA signature generator that improves security for your organization. This change impacts all users that have not already updated. If you have not received this update, please contact your local business office.

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**Contact Us**

- Please contact the IPPS Team at 858-822-2828 or visit our website at www.ucsd.edu/pps for more information.

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- Each Thursday, important updates related to Departmental Finance, Grants, Concur Travel & Expense, and the Financial Information System Implementation are delivered to your inbox.

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**Feedback**

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