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June 1, 2021 - 22nd Edition

Budget & Finance Weekly Digest

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Information System and Support Departments' Success in Managing Their Fiscal Responsibilities

We've added a new section in the Weekly Digest to help prepare you for Fiscal Year Close (FY22)!

This week's focus areas include:

- Oracle: Buying and Paying for Financial Unit
- Creating New Expense Reports
- Travel and Entertainment
- Project Closure
- Funding Entry Combination Request
- Unidentified Items

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Note that this is not an introductory course. Participants should first complete Oracle: Procurement and Payables eCourse to understand the charting and combinations concepts.

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Current and prospective cardholders will learn about updates to the card and related services. This course has recently been updated to reflect campus feedback to reflect best practices.

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This is a reminder to move any pending transactions from Available Expenses onto the Budget and Finance, including Oracle Procurement and Payables. If no user action, the Request should close automatically.

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Funding Entry Combination Request

The Funding Entry Combination Request is available through the UC Learning Center.

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Unidentified Items

If an invoice is received against a transaction that references a closed project, the automatically identified items should be canceled. This will lift commitments associated with these requisitions. The person who created the requisition can do so by following the instructions provided. If you are the person who created the requisition, you will need to inform the university cardholder.

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Projects Can Be Closed with Outstanding Commitment

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IPPS has developed a new on-demand eCourse as a follow-up to the live course on Workflow and Commitments in Oracle Procurement & Payables.