February 2nd, 2021 - 5th Edition

Budget & Finance Weekly Digest

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

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial

Travel & Entertainment Card

Gifts and Awards

How to Create a Gift Card Request

open up the merchant code on the T&E card for a limited time.

cardholder. Should the business purpose fall within university policy, IPPS can

purpose, the merchant from whom you would like to purchase the card [Target,

Financial Units will not appear in Concur if they do not have any assigned

is possible that there are no approvers associated with the Financial Unit.

If you have searched for your Financial Unit by text/code and cannot locate it, it

How to Resolve Concur Alerts

attachments during checkout to your requisitions in Oracle Procurement.

How to Add Comments and Attachments to Requisitions

But depending on where you're looking in Oracle, you may see a chart string

Chart String and POET Terminology

To request a new Oracle Financial Report or an Enhancement to an Existing

Oracle Financial Reporting: New or Enhancement Requests

The following report enhancements will be implemented in production on

Next up Reporting Enhancements

project information, POET(AF), or any of its individual parts (e.g. Project,

Depending on where you're looking in Oracle, you may see a chart string

PI, Project Manager, and Fund Manager.

dashboard, offering a full look at project financials and designed to support the

Watch as the Oracle BI team demonstrates the new Project Panorama

BI & Financial Reporting

This session featured guidance on how to accurately populate POET

information in Oracle Procurement and Concur.

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Please note that Approvers and IPPS Processors can still view the Report Key

on the header.

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related resources:

appropriately.

may now claim mileage on your expense reports to be reimbursed

2021 mileage rates. For those who incurred mileage expenses in 2021, you

reimbursement rate for driving an automobile in connection with a move or

Announced in the 2nd edition

2021 Mileage Rate Updated in Concur

and effort in locating COA/POET information.

default search filter from Search by Text to Search by Code. In direct response

Concur Travel & Expense

Type: 532300 - Research Related Maintenance and Repairs. We are regularly

Expenditure Type

Accounts (CoA), and there can be more than one (1) Expenditure Type per

inquiries, please

SPARCM Department Users

Users should review their ledgers to ensure their NGN charges are being

accounting period

transfer) is made in UC Path, the recharge will correspondingly follow the FTE

Please keep in mind, once a payee/supplier has successfully submitted their

Supplier Setup Team Turnaround Time

Oracle Financials Cloud

resolve the root cause of this issue. Thank you for your patience and

appropriate approval workflow. You can check the approval workflow/status of

As of this morning, the Concur Approvers have been successfully loaded into

Concur Request or Expense Report Approver Error Resolved!

Announcements

- policy on allowable gifts/awards (Blink)

- use and benefits (Blink)

- known transitional issues

- new KBA

- consult this guide

- instead of clicking on every month when running a report over a longer

- they're the same as PM and TM.

- Changing the name format for PIs to be “Last Name, First Name” so that

- FUNCT will now be a prompt for GL Project Balances & GL + Subledger

- of just highlighting the search term

In the next open window, locate the Report Key in the detailed report

Open your expense report in Concur