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February 9th, 2021- 6th Edition

Budget & Finance Weekly Digest

Oracle BI Consumer - Tip of the Week!

Tips & Tricks

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

walkthrough of the Role Request process.

For best performance, Concur should be used on the latest version of Google

while on the go with the

ensure the PO and any associated invoices show on the PPM ledger. Learn

Procurement, the billing section determines to which project and/or chart string

Oracle Financials Cloud

This report allows users to forecast staffing expenses for a particular Project or

HR/Payroll

Starting February 1st, this new report will be available at reports.ucsd.edu >

Oracle BI Consumer - Tip of the Week!

Oracle, our teams are working diligently to transfer more identifiable Concur

Given the limited Concur information currently visible on your invoices in

Concur Enhancement In the Works

opposed to when something should be a task, and providing standard reports

We thank you for your patience as the team works to provide new guidance on

Revenue and resources are not showing on tasks needed for Profit and Loss

Projects, budget should not be confused with resources. A budget will help to

into account resources, expenses as well as prior year carryforward.

period, typically one year. The budget that results is used in some cases to plan

budgets feeding from Oracle Budget (EPBCS) into PPM General Projects.

central offices continue to explore the potential impacts of incoming FY22

details.

checks to resubmit, please submit a Services & Support case with the check

number of banks that may continue to reject these checks based on the first file

Checks issued in early January were being rejected by banks as they were

Checks issued in January can now be deposited or cashed.

Any check issued since January 1st, 2021 can now be deposited or cashed.

however, the formatting of dates in the payment file sent to our bank made it

Checks issued in early January were being rejected by banks as they were

Depositing Checks Issued in January

new web address in your browser.

Blink pages related to Oracle Procurement, which previously referenced

Oracle Procurement Blink Page Updates

of the above process; with the new CVR, this will no longer work but is also no

Effective February 8, for new Sponsored Projects Awards, departments no

Additional Information:

Announcements

troubleshooting

concur

Submit an Oracle and Concur Role Request?

roles departmental preparers need

processes related to meetings, entertainment, and business expense

The live training course will include an in-depth explanation of Concur

Tuesday, February 16 @ 1:00pm

day when it comes to payables.

The University “Payables: The Elements of Accounts Payable” training

Employee travel-related expenses are managed through Concur, a company

Trusted Third Party Provider

Oracle

That is, are funds associated with a specified project and/or chart string

The funds above, you will receive a COA Validation error. Transactions

New chart strings using funds 20001, 20003, 20401, 20402, 20701,

(please do not refer to the Index Mapping tool):

these fund values in Oracle and Concur for your Requests, Expense

20702, specifically designated for UCPath will not be allowed for new

may be

incorrect funds will not be affected.

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