How to Initiate

Overview

Delete Concur Requests and Expense Reports

(Financial Unit, Department Head, Special Entertainment) in a timely manner

If your document has not been approved by your department approver

Read more about how to do so in our new

columns of lesser importance, and reorder the columns to customize your view.

Purchase Order display in the PO module, it's a good time to reorder the

You can view various flags associated with suppliers, including determining if a

For the best experience in Oracle, we would recommend using the Firefox

status inquiry via

A new training video has been released! Watch this demo to learn how you can

This course has recently been updated according to campus feedback to reflect

Information on Departmental Action and Cutoff dates for Fiscal Closing 2020-

Expense Report(s) and, as applicable, submit them for approval before the

move any pending card transactions from Available Expenses onto the proper

Reconcile Expense and Card Transactions

do so by following these steps:

requisitions. The person who created the requisition can do so by following

these requisitions will not be submitted in the future, then these requisitions

Cancel Incomplete or Rejected Requisitions

at

with the relevant invoice and customer information. Please review

University will be able to collect on, please submit a Services & Support ticket

that departments please make all efforts to identify and claim all

Friendly reminder that as we head into our first fiscal year-end close, we ask

Update KR Subawards

Codes

Update ISIS Detail

Recharge Purchase Order Commitments have been Lifted

Announcements

Update PPM Budgets

PPM have been removed from PPM Costs. To see

Combinations for newly created projects have been

related to: Oracle Accounts Receivable

All converted tasks were end dated with 9/30/21. If you

Complete a Direct Retro in UCPath to move payroll for

June or any subsequent period to the new

Complete a Direct Retro in UCPath to move payroll for

Budget & Finance, including Oracle

May or any subsequent period to the new

Commitments associated with STORE and Core Bio Services have officially

Recharge Funding

GL resources only posted in

Modify AR postings (non-

Changes

PPM Personnel Updates

PPM Budget Updates

Tasks to Projects, Project Personnel Updates Now Complete!

Awards with an end date of 2/31/2021. Please prioritize reconciling these

The NIH Reports due for June 2021 are posted in the

NIH FFRs Due for June thru Sept 2021 Now Posted

Amend and screen those transfer requests through S&S which require central office processing

June 15

June 14

Next Up

Click the

Navigate to the Travel/Event Request

Partner with your VC office to initiate resource transfer

Create a resource transfer request in the S&S interface.

Submit the resource transfer for approval.

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Choose the resource type.

Review and approve the resource transfer request.

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