Budget & Finance Weekly Digest

June 15, 2021 - 24th Edition

Welcome to the Budget & Finance Weekly Digest!

About the Weekly Digest

Each Tuesday, representatives select the latest relevant articles from the weekly updates for the Oracle Procurement and Concur. We have filtered through hundreds of articles to bring you the top updates impacting financial processes and systems.

Tips & Tricks

Oracle Financials Cloud

Oracle Financials Cloud is now available for viewing and lifting commitments as new information becomes available. Refer back to the Blink page at https://www.ucop.edu/budget-and-finance/guides/blink.html to learn how to add and manage Travel Allowance (Per Diem) in your Travel Expense Report.

Additional Resources

Oracle Procurement and Concur. Watch as our instructors review best practices and the latest developments in the world of Oracle Procurement and Concur. Enhance user navigation, we will actively work to keep training updates are released, including enhancements to UI/UX improvement projects. Required approvals for new projects or augmentations must already have been received.

Oracle initiated transition to a new theme is part of a larger release of Oracle Sign In page enhancements. The new theme is now available for selection when submitting a Procurement Card Expense Report in Concur Travel & Expense. All updates are released to campus in phases over the next several months. As the release is implemented campus wide, please ensure that any non-employees have been invited to register or have access to Concur. Doing so will cause reimbursements to be processed by Concur. Please refrain from directing non-employees and sponsored affiliates to process their own reimbursements via Concur.

Who Can Access Concur?

To access Concur, use your HR or Financial Unit (Per Diem) in your Travel Expense Report.

Oracle Procurement and Concur Features

- Users can now automatically calculate per diem rates for both meals and lodging in Concur.
- For users currently using Concur Travel & Expense, when you set your per diem rate, Concur will automatically calculate the per diem amount for you.

How to Change the POETAF or Chart String on a PO Invoice

If you receive a PO invoice to approve as a financial unit approver and realize the requisition consists of catalog, punchout, or request form items. You may also need to determine whether each line item is quantity-based or amount-based. Learn how to differentiate orders in Oracle Procurement.

How to Split Fund a Purchase Order in Oracle Procurement

While checking out you may notice a 'Budget Date' field. Do not adjust the date and do not enter any new PO invoices at this time. Instead, do not use this function and refer to your department fund manager for assistance.

Hot Topics: Commitments

This is a great Hot Topics for those with projects impacting financial processes and systems. Check back next week for a new Hot Topics update.

Hot Topics: Oracle Procurement and Concur

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