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June 15, 2021 - 24th Edition

Budget & Finance Weekly Digest

Information System and Support departments’ success in managing their fiscal responsibilities.

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

Additional Resources:

Sponsored Affiliates can log in and access Concur. They should utilize this tool to submit their own POs.

If the payee is not a current UCSD employee, then a faculty or staff member at the department is responsible for processing the request.

If you fall into one of the above categories and cannot access Concur, please contact your department's accounting office for assistance.

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Helpful Resources:

- How to Change the POETAF or Chart String on a PO Invoice
- How to Differentiate Orders in Oracle Procurement
- How to Split Fund a Purchase Order in Oracle Procurement

How to Differentiate Orders in Oracle Procurement:

By identifying key areas of the line items, you can determine whether a requisition consists of catalog, punchout, or request form items. You may also want to split the chart string or project analogous to how by taking a look at our new Oracle Financials Cloud Tips & Tricks.

How to Split Fund a Purchase Order in Oracle Procurement:

During the checkout process, the individual submitting the requisition has the option to split their order amongst multiple chart strings or projects. Refer to our new Oracle Financials Cloud Tips & Tricks.

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Tips & Tricks:

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

The theme for the full year of Fiscal 2021 is posted to Concur. Watch as our instructors review best practices and KBAs in sync with the releases.

The new Oracle Financials Cloud Tips & Tricks is now available and has an enhanced look and feel! Please share these updates with your colleagues and department managers.

Update on Concur: The Concur Travel and Expense (Concur Expense Type 534002) has been moved to UCPath and Concur. The Concur Expense Type 534002 is now referred to as Purch License Download.

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