Budget & Finance Weekly Digest

January 19, 2021 - 3rd Edition

Find answers, request services, or get help from our team at the UC San Diego Budget & Finance Support. We promote training, tools, and communications to take full advantage of the financial services and systems available to you and your projects.

- "Recently Used" section that would appear at the top of the drop-down menu.
- Note: When applicable, be sure to look for the available options below the drop-down menu.

How to View Available Form Field Options

Concur documents are smart forms, where certain form fields are connected.

- How to Edit and Delete Concur Requests and Expense Reports
- Related Resources:
  - Update on Payables Ledger Discrepancies
  - How to Resolve POETAF/COA Failed Validation Errors in Concur
  - How to Edit and Delete Concur Requests and Expense Reports

How to Default a Deliver-to Location in Your Profile

Oracle & Concur webinar: How to ship to a personal address.

- How to Ship to a Personal Address

Oracle Financials Cloud

- Oracle cost transfer has a character limit of 1000 for the justification and funding source.
- Oracle Financials Cloud - Descriptive Flex Fields (DFF)
  - DFF stands for "Descriptive Flex Field" and is what drives the accounting for a given project segment.
  - Reporting Center > "DFFs for Non-Sponsored Project and Task Report". DFFs are used to indicate the funding source.
  - Cross-Validation of funding source and project segment.

Update on Payables Ledger Discrepancies

- The transactions that were impacted involved invoices that had new line items brought over into PPM.
- Each transfer requires a separate request.
- Will only be reflected in the general ledger (GL), meaning the chart string account combination that's disabled. You must submit a separate request for each transfer.
- For instructions on how to ship goods ordered via Concur Travel & Expense, visit the Budget & Finance portal.

How to Request an Oracle PPM Award Temporary Extension

- Each 1st request results in a one-time 6 month extension on the award/project.
- Each 2nd request results in an additional 6 month extension on the award/project.
- Will only be reflected in the general ledger (GL), meaning the chart string account combination that's disabled. You must submit a separate request for each transfer.

How to Default a Deliver-to Location in Your Profile

- For assistance in finding information on Fixed Price Award transfers, go to the Concur Travel & Expense portal.
- How to Edit and Delete Concur Requests and Expense Reports
- Related Resources:
  - How to Edit and Delete Concur Requests and Expense Reports

Training Courses

- How to Default a Deliver-to Location in Your Profile
- Each Tuesday important updates related to Budget & Finance are delivered to your inbox.
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