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June 22, 2021 - 25th Edition
Budget & Finance Weekly Digest

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About the Weekly Digest

Financials Cloud and Concur Travel & Expense User Guides

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To hear all about it, please attend both of the following office hours:

1. PPM Reporting and Bi-Weekly Financial Reporting: June 22, 3-4pm
2. Financial Systems for PPM: June 23, 10-11am

The PPM User Guide is a living document updated as processes are refined. Refer back to the Blink page at kb.ucsd.edu/PPM for the most up-to-date information.

Please note that this page is subject to change and please consult the PPM User Guide for the most current information.

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How to: Reference Shipping Charges on Purchase Orders

A process for setting up a Financial System Requisition for purchase orders that are being shipped to a campus location.

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Out-of-Pocket Expenses - The student/employee needs to submit an expense report for travel and expenses that do not have a direct purchase order (PO) number linked to them.

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Employees who have not yet entered their PPM details into the system can do so by clicking the Project Number & Name.

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Procurement Card, Concur Booking, Oracle Procurement, and Amazon Business.

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How to: Add a Requisition KBA

A KBA is a knowledge base asset that is created to assist users in finding the right solution to their work-related queries.

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Receivables Aging Report

An Aging Report is typically generated on a periodic basis to assist in identifying outstanding amounts from financial transactions.

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The primary audience for this report are financial officers looking to reconcile their budget to the actuals.

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The Cellular recharges posted to their department ledgers.

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Billable and non-billable expenses.

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Commitments on closing projects that need to be expensed should be resolved during the close.

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Other expenses appropriate to the Award project

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Expenses must be justifiable, auditable, and ideally what will be posted to therevenue stream.

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Faculty, Researchers, and Fund Managers

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