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Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial systems available at the university. This edition highlights important updates related to budgeting, financial reporting, and Concur Travel & Expense systems.

Contact Us!

Budget & Finance Support conducts a survey to determine the number of Project Budget Validation holds on Concur invoices. This will help in reducing the number of Project Budget Validation holds. The survey results are available on Blink, which showcases a consolidated view of Office Hours, Instructor-Led Training sessions, and Hot Topics. Be sure to access this valuable resource for the latest updates and information.

Oracle Financials Cloud

Oracle Financials Cloud updates related to the Payables Cost Transfer tool, which was sunsetted on October 1, 2021. The Payables Cost Transfer tool was used to transfer cost elements to the General Ledger. The tool has been replaced by the Oracle Financials Cloud Cost Transfer feature, which offers improved functionality and enhanced capabilities.

Training & Support

Non-Event reimbursements in Concur. are considered employees for the purposes of processing Travel, Event, and Project Budget Validation. When creating expenses, the Payee Type should be set to Employee, not Student. Additionally, the Payment Header should be set to Employee, not Student. Traveler/Payee Type Student refers to non-student employees who do not have a UCPath ID. The Payment Header is Employee, not Student. For Travel and Events Expense Reports that involve Student Employees, the Payment Header should be set to Employee, not Student. This will help in accurately entering the appropriate information for the report.

For Travel and Events Expense Reports that involve Student Employees, please refrain from providing the Request ID when referencing an Expense Report. This will help in determining your Request ID or Report ID, follow the steps in the report.

Please remove all bookmarks and redirect to the new Project COA Lookup Tool. The Central Oracle BI team released a new Project COA Lookup Tool!!! It is now available in the Oracle Finance & Payables application. To access the tool, go to:-> Financials & Reporting -> Budgeting & Financial Reporting -> Project COA Lookup Tool. This tool is useful for identifying valid chart string combinations for your project.

This report will return the chart string combinations that are valid for your financial unit, project, task, and person name. The chart string combinations returned will be searchable by FinUnit, Project, Task, or Person Name (assigned as the lookup parameter). This tool is designed for use by financial unit, project fund manager, project task manager, and task manager. The tool is also available in the Oracle Financials Cloud, which is now available to shoppers.

The tool is designed to be user-friendly and easy to find. It has been tuned for more exciting updates as we look at the next edition of the digest.

Culture Notes

The Communication Champions team is excited to announce a new initiative called the "UCSD-DSH Project Information Reporting At Your Fingertips." This initiative is focused on improving the reporting process for Project Information. The team has developed a Project COA Lookup Tool that is available in the Oracle Finance & Payables application. This tool is designed to help users find the valid chart string combinations for their project.

Oracle: Buying and Paying for Financial Unit Approvers

This course includes hands-on instruction on the use of Oracle Procurement & Payables for creating requisitions, purchase orders, and invoices. The course is designed for financial unit approvers who need to understand the procurement process. The course is available on Wednesday, August 12, 2021 from 9:00am to 11:00am. This course is also available on Thursday, August 12, 2021 from 8:30am to 9:15am.

Hot Topics: Lifting Commitments in Oracle Procurement & Payables

This training webinar consists of a 30-minute presentation followed by a Q&A session. The webinar is focused on the process of lifting commitments in Oracle Procurement & Payables. The session will cover best practices for lifting commitments, including when to use the process and how to avoid common mistakes. The webinar is available on Wednesday, August 25, 2021 from 11:00am to 12:00pm.

Oracle Procurement: Buying Research and Inventorial Equipment

This training webinar is designed for users who need to understand the process of buying research and inventorial equipment. The webinar covers the key steps involved in the procurement process, including how to create requisitions, purchase orders, and invoices. The webinar is available on Thursday, August 12, 2021 from 9:00am to 11:00am. This webinar is also available on Thursday, August 12, 2021 from 8:30am to 9:15am.

Oracle: Buy & Pay, Finance, Logistics, Travel & Expenses

This training webinar is focused on the process of buying and paying for financial unit approvers. The webinar covers the key steps involved in the procurement process, including how to create requisitions, purchase orders, and invoices. The webinar is available on Wednesday, August 11, 2021 from 1:00pm to 2:00pm. This webinar is also available on Thursday, August 11, 2021 from 1:00pm to 2:00pm.

Oracle Procurement & Payables

This training webinar is focused on the process of buying and paying for financial unit approvers. The webinar covers the key steps involved in the procurement process, including how to create requisitions, purchase orders, and invoices. The webinar is available on Wednesday, August 11, 2021 from 1:00pm to 2:00pm. This webinar is also available on Thursday, August 11, 2021 from 1:00pm to 2:00pm.

The best way to contact our team is via our website: bah.ucsd.edu. We at IPPS are also continuing to improve upon the payables validation process. We have removed all validations that were not properly designed or utilized. We are committed to delivering the best possible experience to our customers.