Getting Ready for Fiscal Close

**Announcements**

- **The Fiscal Close Bulletin**
  - May 31
  - Available on Blink, which showcases a consolidated view of Office Hours, Instructor-Led Training sessions, and more.
  - Accessible through the Training & Support section of the Budget & Finance Weekly Digest.

**Training & Support**

- **Oracle: Buying and Paying for Financial Unit Approvers**
  - This course includes hands-on instruction on the use of Oracle Procurement & Payables.
  - Focuses on topics such as requisition creation, purchase order processing, and payment processing.

- **Oracle Project Portfolio Management (PPM)**
  - For users who need to manage project portfolios.
  - Includes features for tracking project costs, managing resources, and reporting on project status.

**BI & Financial Reporting**

- **New Report Release**
  - Transaction Details with High-Risk Ledger Review
  - Details, and Project Cost Details reports, and adds significant additional functionality beyond what is available on those.

**Tips & Tricks**

- **Fabrication costs on non-fabrication tasks**
- **Costs posted after the project end date**
- **High-dollar invoices**
- **Transaction Details**
- **Simultaneously search for both PPM and General Ledger transactions using a single set of prompts.**
- **Identify all revenue transactions without having to select all revenue account codes.**
- **Eliminate or isolate transactions that have been cost transferred off of a project in PPM.**
- **Click to access the** [Support Framework](mailto:https://www.supportframework.com).

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**Webinars & Instructor-Led Training**

- **Join IPPS for its next Hot Topics Session!**
  - **Learn how to book travel the Triton way,** including the benefits of booking with the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer your questions.
  - **1:00pm - 2:00pm**

- **Submit an enhancement or idea**
  - **IAC** was originally established to work through ESR changes, enhancements and roadblocks.
  - The committee meets every other Friday, and members are asked to actively engage in discussions, bring a positive solution-oriented attitude, and participate in posting in the Teams Community of Practice.

**Equipment Asset Management Office Hours**

- **Reviewing complicated situations surfaced by IAC members which we either work out in the moment or follow-up with the** [Equipment Asset Management Office Hours](mailto:mailto:https://www.equipmentassetmanagementofficehours.com).

**Missing Receipt Requests**

- **Updated Missing Receipt Request Process**
  - The Procurement Card team is changing the way Missing Receipt Requests are processed. As of May 11, submitting a duplicate receipt is required once transactions are initiated and should remain consistent in the general ledger.
  - Departments across the University will no longer be required to submit a Missing Receipt Request.

**Oracle Project Consulting Services**

- **Introducing Oracle Project Consulting Services**
  - A new service offering for Oracle Project consultants.
  - Provides project management, implementation, and support services.
  - Contact [Oracle Project Consulting Services](mailto:https://www.oracleprojectconsultingservices.com) for more information.

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**Campus Budget Office**

- **Seeking feedback**
  - The Campus Budget Office wants your feedback!
  - For questions on the guidance or the checklist, please consider attending the PTAF meeting or the Biweekly Financial Reporting session.

**Oracle Project Portfolio Management (PPM)**

- **Run reports and what to look for during the review process.**
  - The internal controls guidance includes a checklist with periodic control activities to be performed and certified by performers and certifiers, and it includes links to articles and Blink pages that provide instructions on how to run reports.
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