University of California San Diego, 9500 Gilman Drive, La Jolla, CA, 92093

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

Type and Mileage Calculator in Concur. Attach a mileage log or Google Maps screenshot if you have one. Make sure to provide dates and distances.

If you are a traveler and the revised Concur (e.g. 2020), please use the Concur Travel & Expense tools.

If you do not have WalkMe installed, please refer to the Guidance on Entering POET Information in Oracle Procurement. This will help you learn more about the process.

Oracle Financials Tip: If you are a project or grant manager, please refer to the Where Are My Sub-Accounts? guidance throughout Oracle. Requires the WalkMe browser extension. If you do not have it installed, please refer to the WalkMe installation guide.

Oracle Planning and Budgeting production environment is live! This is a major milestone for our Oracle Planning and Budgeting system, introducing thoughtful design and user experience enhancements. We are excited to enhance our capabilities to provide a more engaging and efficient way to access and manage financial data.

New Concur invoice information will launch this week in efforts to enhance vendor payment visibility. Please note, the new invoice information will be visible in Oracle Procurement.

Please note, the new invoice information will be visible in Oracle Procurement. This field has been added for any requisition with associated services.

Work Fair Wage every year. To assist with this, please populate this field for anyone performing work on a UC site. The minimum wage in California is $15/hour. Please refer to the Work Fair Wage policy for more information.

The new Oracle Planning and Budgeting system is now available! This marks a significant milestone in our journey towards enhancing financial planning and budgeting capabilities. We invite you to explore the new features and how they can benefit your work.

Please note, the new invoice information will be visible in Oracle Procurement. Check out the new invoice monitoring dashboard in Oracle for a quick overview of your invoices.

UC San Diego Banner and Oracle Procurement Tip: If you have questions about this edition, the best way to contact our training support team is through our training portal. You can search for specific training topics or browse our library of resources.

Oracle Financials Tip: If you are a project or grant manager, please refer to the Project and Grant Management: Getting Started guide. This will help you understand the basics of managing projects and grants.

Oracle Planning and Budgeting Tip: If you are a project manager, please refer to the Project Costs Transfer Dashboard. This dashboard is designed to highlight the transaction cost transfer details for your project.

Oracle Financials Tip: If you are a project or grant manager, please refer to the Personnel Expense Projection Report. This report allows users to forecast staffing needs and plan budgets accordingly.

Oracle Planning and Budgeting Tip: If you are a project or grant manager, please refer to the General Ledger Details report. This report provides detailed transaction line-item information and original source documentation for your project.

Oracle Planning and Budgeting Tip: If you are a project or grant manager, please refer to the Project Balances with Expenditure Details report. This report presents project balances and expenditure details for your project.

Oracle Financials Tip: If you are a project or grant manager, please refer to the Payroll Accounting and Payroll Reports. This report provides information about what happened to IFIS sub-accounts. Oracle Financials Payroll Accounting and Payroll Reports are available, but no budget data for projects. YTD for the Accounting Period selected. Project report parameter is always set to the current period.