Responsibilities, identify their resources based on the following questions:

Learning all there is to know about budget & finance can feel daunting. The Support Framework: Your Guide to Finding Help If you have cookies blocked on Safari, there is a good chance you will experience issues when using Concur. Ensure that all cookies are enabled, otherwise you might experience issues with Concur access and Expense Report Approvals. If you are unable to access Concur, please contact your local IT administrator and ask about this issue.

Project Payroll

Discussions and report demos to help address some of your frequently asked questions. There may also be opportunities to join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include a discussion on how to access report data, a session on how to interpret the report, and a Q&A session. There will be opportunities to ask questions and receive feedback from the BI & Financial Reporting team.

Monday, June 12 @ 11:00am

Come get your questions answered and solidify your knowledge and understanding from a useful and fun information packed session. Don’t miss it!

Fund Management Office Hours

Come get your questions answered, system access setups, or helpful hints on the effort report certification process. Every Wednesday 2:30pm - 3:30pm

June 7

Join us each week to ask questions and receive feedback from the Fund Management team. The team will be available to answer any questions you have about the effort report certification process, system access setups, or any other related topics.

Mixing Business with Personal Travel

Activities

From now until August 2nd, join the Fiscal Close Office Hours to ask questions and provide feedback regarding fiscal close research. Every Wednesday

Fiscal Year-End Accounts Payable (AP) Process

In our previous meeting, we discussed the importance of ensuring that all invoices and expense reports are complete and accurate before the fiscal year-end. This week, we will focus on the Accounting and Payables process for Fiscal Year-End. We will discuss the process for Oracle and Concur, including journal entries and AP accruals. The project will be updated to the class code, Research, on June 10. No action is needed from departments.

Project Classifications

Currently, Clinical Trials are separated between PI and Sponsor Initiated and are marked as such on the Award and with PADUA. BFG has approved eliminating these project classifications. Existing projects will be updated to the class code, Research, on June 10. No action is needed from departments.

Portfolio Updates to Department Reporting Categories

Department Reporting Categories will be automatically updated and no action will be required from departments. Ongoing, the Department Portfolio will be updated to include all projects. The Portfolio will be available on the UC San Diego Budget & Finance YouTube channel.

Fiscal Year-End Accounts Payable (AP) Process

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