

# Budget & Finance Weekly Digest

November 16, 2021 | 46th Edition

## Announcements



### **Oracle Cloud Scheduled Maintenance**

Oracle production environment will be down for maintenance on **Friday, November 19 from 7:00pm - 10:00pm.**

### **General Projects and CIP Costs**

General Projects should not have CIP Costs (163500) on them. The reason is due to lessons learned during the fiscal year end: the CIP account is supposed to be used for any expenses that will be capitalized (moved into Fixed assets later on). There will be Transaction Controls added to PPM to exclude these expenditure types from being used on General Projects.

### **Fixed Price Financial Closeout Update**

Effective immediately, to align with the campus decision to have resources residing in the GL only, the Fixed Price (FP) Financial Closeout Process was modified to reflect the residual balances as resources to the full GL chart strings provided by the Award Owning Department. This process covers all Fixed Price projects/awards managed by Sponsored Projects Finance (SPF) including Sponsor Initiated Clinical Trials with residual balances.

If you have an existing pending FP Closeout request, please complete the new [FP Financial Closeout Form](#) and contact your SPF Award Accountant. For more information, please review [Fixed Price Policy](#).

## UCPath Update – MCOP Funding Reallocation Process

This process did not run successfully after the October 1 range was implemented. If you haven't already, you will need to manually update the funding on the MCOP worksheet and process necessary Direct Retro (salary cost transfer) transactions. This primarily impacted GCCP and HSCP participants. If you are entering these Direct Retro transactions prior to the PUM Upgrade downtime, **make sure local approval happens before December 10.**

## Financial Accounting Program: Winter Quarter Application Closing Soon

The [UC San Diego Financial Accounting Program](#) Application for Winter Quarter is currently active and open for another 4 days. **It will close this Friday, November 19.** We have updated the application from Fall Quarter to include clearer instructions and modified a few questions. Please note that the first page of the application will display an overview of how many sections of questions there will be. Once you proceed to the next page of any section, you will not be able to return to the previous page.

If you are interested in starting in Spring or Summer Quarter, we encourage you to also apply. We are continuously looking to fill seats in future quarters and it will provide us a better picture of demand.

Additionally, we are looking to support as many course interests as possible, so keep an eye out for a question that offers the option to select your interest in completing the entire program or select courses.

If you have already applied during the September round of applications and have yet to hear from us or communicate with us about Winter Quarter, please email [financesupport@ucsd.edu](mailto:financesupport@ucsd.edu) with your continued interest or desire to change start quarters.

The link to the application form is [here](#). The deadline is this Friday, November 19. You have 4 days left to apply!

Apply Now!

# Oracle Redwood

January 2022

## Navigator Drawer Feature

As part of the new Oracle Redwood UI launching January 2022, in the upper left hand corner, users will find a drawer that opens to show the various modules available. When a user opens a drawer, the system will remember their preferred settings even after navigating away. Watch the [Oracle Redwood Quick Start Guide](#) (under New Home Screen) for a demo of the Navigator Drawer Feature.



## Additional resources to prepare you for Oracle Redwood

- Visit the [Oracle Redwood UI Blink Page](#)
- View the new UI in [Oracle Test Non-Production Environment\\*](#)
- Register to attend a Preview Session:  
[Wednesday, November 17 @ 12:00pm](#) or [Thursday, December 2 @ 9:00am](#)
- If you or your teams have created local training materials, be sure to update accordingly

\* You can view the upcoming Oracle Redwood UI changes in the Oracle Test Non-Production Environment - VPN and SSO are required. Since this is a test environment, data may not be the same as in production. If you experience issues during login, you can request access support by emailing [financesupport@ucsd.edu](mailto:financesupport@ucsd.edu) with the subject "Oracle Redwood Preview."



## [Oracle Redwood Preview Session](#)

**Wednesday, November 17, 2021 @ 12:00pm - 12:30pm**

Register for the Oracle Redwood UI Information Session to get a firsthand glimpse into the new Oracle theme, set to launch January 2022! To prepare for

the Oracle Redwood Preview Session, [review the Preparation Toolkit](#) and be sure to have your questions ready.

### **Accounts Receivable, Cash, & PPM Office Hours**

**Friday, November 19, 2021 @ 8:30am - 9:30am**

This week, we will be discussing reconciliation strategies between GL and PPM. We will dive into activities, reports, approaches, timing and more, all related to the reconciliation process. Then we will open it up for a Q&A both related to the topics discussed or anything else that might be of interest to the attendees. Bring your questions, comments and your experiences to share with your colleagues across the Campus. We are looking forward to seeing you this Friday!

Recorded Accounts Receivable, Cash, & PPM Office Hours [can be found here](#).

### **Hot Topics: End of Year Preparations**

**Tuesday, November 30, 2021 @ 10:00am - 11:00pm**

Join the IPPS Team for the next session of Hot Topics! This session will focus on how best to prepare your transactions to meet the calendar year deadlines for the Procure-to-Pay and Travel & Expense spaces. There will be a chance to participate in Q&A at the end.

*Click to access the [Event Calendar](#) on Blink, which showcases a consolidated view of Office Hours, Instructor-Led Training sessions, and Hot Topics. Be sure to try out the different calendar views in the upper right corner!*




### **Booking SWABIZ in Concur**

Looking for SWABIZ? UC travelers love Southwest Airlines and can access the same SWABIZ flights directly in Concur. Booking your Southwest ticket in Concur means automatic registration in travel insurance, the same discounts you're accustomed to, a central payment card in place (no out-of-pocket expenses) and with the added support of Balboa Travel should you need it.

The SWABIZ direct booking site is still available from your Concur homepage. This is a great option for personal travel! From your Concur homepage, click on *Read More* under *Company Notes* and find the SWABIZ option under *Travel*:

## COMPANY NOTES

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<ul style="list-style-type: none"><li>• Official University Travel Policy During COVID-19</li><li>• Apply for a T&amp;E card</li><li>• Payment Services</li><li>• <b>SWABIZ ID 99723724</b></li><li>• Connexus Resources</li></ul>	<ul style="list-style-type: none"><li>• Apply for a T&amp;E Card</li><li>• Catering &amp; Event Svcs.</li><li>• Meal Allowance</li><li>• Entertainment KBAs</li></ul>	<ul style="list-style-type: none"><li>• Apply for a P-Card</li><li>• Restrictions</li><li>• Huawei Moratorium</li><li>• P-Card KBAs</li></ul>	<ul style="list-style-type: none"><li>• Payment Compass</li><li>• IPPS News</li><li>• Subscribe</li><li>• Follow</li><li>• About IPPS</li></ul>

### Rental Car Reminder

Rental car agencies continue to be impacted by the COVID-19 pandemic. As a result, renters will now need to show UC identification when picking up a rented vehicle either for business or personal travel.

As a reminder, business rentals need to go through Concur or Balboa Travel to ensure our negotiated rates and insurance coverage.

Personal rentals must go through Connexus. Personal rentals feature our negotiated rates of \$30-\$35/day without the insurance component.

- To get to Connexus from your Concur home page, click on *Read More* under *Company Notes*
- Select *Connexus Resources*
- Select your campus and log in with SSO
- Navigate to the *Personal Travel* tile and choose your preferred rental car partner.

Each Tuesday, the Weekly Digest provides important updates related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense.

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