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

Find answers, request services, or get help from our team at the UC San Diego information system and support departments’ success in managing their fiscal responsibilities.

We invite you to join in one of two ways:

Budget & Finance Community of Practice

The Budget & Finance CoP is a learning network dedicated to bringing the UC San Diego financial community together to share and crowd source knowledge related to specific topics. Participants serve on a volunteer basis and are committed to sharing ideas and experiences to improve departmental fiscal management.

Budget & Finance CoP in MS Teams

Attend the event?

We review which OFC reports are most frequently used by departments to find updates on system implementations, discuss practice and strategies to improve departmental operations.

This session provides a comprehensive update on system improvements, data changes, and provides an opportunity for departments to share best practices and feedback.

In-Cases You Missed It...

For any expenses that continue to display an error related to a missing allocation field, delete it from the expense report and create a new one with the correct field.

Budget Summary (EBS) Report

Provides the user with budget, actual, and budget variances in a profit and loss statement format for the current fiscal period and YTD. For details see Knowledge Base Article (KB0032607): "UCSD Expanded Budget Summary (EBS) Report".

UCPath, process a Direct Retro transaction, and/or submit a ticket for a case to assist you. This Toolkit not only provides step by step instructions, but also links to pertinent KBAs, Job Aids and other reference materials.

We have identified and corrected the issue behind this Concur Expense Report error, which required expense reports created between 11/13 and 11/19. We made an effort to fix this issue with Concur and are closely monitoring to ensure there are no further errors. If you have a situation of this nature, please correct it and update in OFC.

In Case You Missed It...

For support transacting in OFC and Concur:

We apologize for any confusion this may cause our customers. If you are unable to update position funding in OFC, process a Direct Retro transaction, and/or submit a ticket to assist you.

For any expenses that continue to display an error related to a missing allocation field, delete it from the expense report and create a new one with the correct field.

On November 12, customer billing statements were sent in error from our test environment. We apologize for the inconvenience this has caused. If you still are unable to access your Concur Expense Report, please correct it and update in OFC.

We have created a steps by step guide to assist you. This Toolkit not only provides step by step instructions, but also links to pertinent KBAs, Job Aids and other reference materials. We have identified and corrected the issue behind this Concur Expense Report error, which required expense reports created between 11/13 and 11/19. We made an effort to fix this issue with Concur and are closely monitoring to ensure there are no further errors. If you have a situation of this nature, please correct it and update in OFC.

For any expenses that continue to display an error related to a missing allocation field, delete it from the expense report and create a new one with the correct field.

If you are unable to update the Expense Type without error, delete the expense.

Open the Expense Report header and change one of your COA values to the one you want to use. Click Save. Click Update.

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