

Budget & Finance Weekly Digest

January 25, 2022

55th Edition

Announcements



NIH FFRs Due for January 2022 through May 2022 Now Posted

The NIH Reports due for January 2022 are posted in the [STaRT Tool](#). Please prioritize reconciling these awards and work closely with your SPF Award Accountant.

Reports due through May 2022 are also posted. You can find the list [here](#).

Training & Support



Fund Management Office Hours

Thursdays, 11:00am - 12:00pm

This week we will have an open Q&A. Bring your questions and struggles. Nothing a fund manager does is off the table. Trying to figure out the source of a GL-PPM discrepancy? Can't figure out how to get your direct retro with cap gap to work? See a wire you need to claim but have no idea what to do next? Bring your issue to office hours and phone a friend.

Next Thursday, Deston Halverson, Director of Sponsored Projects Finance, will answer all of your questions about ECERTs. Effort certifications for FY21 JUL-DEC, FY21 JAN-JUNE, FY22 JUL-DEC reporting periods must be completed by April 30, 2021.

Hot Topics: Procure-to-Pay and Travel & Expense Resources

Thursday, January 27, 2022 @ 10:00am - 11:00am

Join the Integrated Procure-to-Pay Solutions (IPPS) Team for the next session of Hot Topics! This is a monthly series dedicated to critical concepts and processes in Oracle Procurement and Concur.

This session, our presenters will review the various resources available for navigating Oracle Procurement & Payables and Concur Travel & Expense, and how to best interact with them. This is a great Hot Topics to attend if you are new to UC San Diego/your role or would like a refresher on the IPPS resources.

Accounts Receivable, Cash, & PPM Office Hours

Friday, January 28, 2022 @ 8:30am - 9:30am

This Friday, we will have an open Q&A. Bring your questions, comments and your experiences to share with your colleagues across the Campus.

Oracle: Buying and Paying for PO Requisitioners

Thursday, February 3, 2022 @ 9:00am - 11:00am

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, closing POs, processing nonPO payments, and checking invoice status. This course will be especially valuable for individuals responsible for departmental purchases who want to further their understanding of buying on campus.

BI & Financial Reporting

New Report Release: Gift Fund Panorama Now Available

The new Gift Fund Panorama is now available in the [Business Analytics Hub](#). The [Oracle BI - Gift Fund Panorama training](#) is now available in the UC Learning Center. More information about this panorama can be found on the [Gift Fund Panorama Dashboard Blink page](#) and a dedicated Office Hour hosted by Kierstin Sykes, Foundation Controller, will be held on **February 9th from 10:00am - 11:00am**; please use this [Zoom link](#) to join.

Campus Budget Office Updates

Reminder: The 2022-23 Budget Development Cycle Begins This Week!

What can you do to prepare for budget development?

1. **Attend** a webinar the Campus Budget Office will hold on **January 25th @ 1:00pm - 2:00pm** to find out what has changed and what is new to EPBCS for 2022. Registration is not required. [Attend via Zoom here](#).
2. **Watch** 5 self-paced short eCourses for basic knowledge of EPBCS prior to attending instructor led training later this month:
 - [Oracle Budget: Planning and Budgeting Navigation Overview](#) (15 mins)
 - [Oracle Budget: Introduction to Staff Planning](#) (11 mins)
 - [Oracle Budget: Introduction to Faculty Planning](#) (11 mins)
 - [Oracle Budget: Introduction to Entering Core and Non-Core Funded Budgets](#) (11 mins)
 - [Oracle Budget: Introduction to Budget Review and Approval using Reports and Dashboard](#) (12 mins)
3. **Register** via the UC Learning Center for instructor-led training (sessions available 1/27 – 2/10)
 - General instructor-led training is highly recommended and designed to meet the needs of both academic and administrative personnel planning. As a Budget Preparer, you can choose sessions applicable to your unique planning needs.

- **EPBCS Training for Academic Units (with Faculty) – Web Based Application**
 - [Oracle Budget: Budgeting Salary & Benefits for Academic Units](#)
 - [Oracle Budget: Budgeting Non-Compensation for Academic Units](#)
- **EPBCS Training for Administrative Units (No Faculty) - Web Based Application**
 - [Oracle Budget: Budgeting Salaries & Benefits for Admin Units](#)
 - [Oracle Budget: Budgeting Non-Compensation for Admin Units](#)
- **EPBCS Training in Smart View (Optional for budget preparers using the Excel Smart View add-in ONLY)**
 - [Oracle Budget: Budgeting Salaries & Benefits in Smart View](#)
 - [Oracle Budget: Budgeting Non-Compensation in Smart View](#)

Need or know someone who needs access to EPBCS?

EPBCS system access requests should be considered if you are a departmental financial manager who manages department and division budgets. EPBCS is not a tool for budgeting sponsored projects/grants.

- For more information on Role Requests, [click here](#).
- [Request access via the Services & Support portal here](#).



Tips & Tricks

Updated KBA: How to Resolve Alerts in Concur

We added new guidance on two alerts appearing in Concur. As a reminder, unlike alerts with a red icon, alerts with a yellow icon provide information to the user and approver but does not prevent the Concur document from being submitted. Here is an example:

INFORMATIONAL: This expense entry may be a duplicate of the following expense. This will NOT prevent the Expense Report from being submitted.

Concur automatically checks for expenses whose entry details appear identical in order to prevent duplicate reimbursement or claim of the same expense. This alert is to prompt the user, delegate or approver to review those expense entries and either ensure that they are true, separate expenses or take action to correct/remove the duplicate expense entry when applicable. If you are certain that this is not a duplicate, no further action is required and you may proceed with processing the Concur document.

[Read the full updated KBA here.](#)

Each Tuesday, the Weekly Digest provides important updates related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense.
Our goal is to deliver timely information that matters to you.

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