Announcements

Learning all there is to know about budget & finance can feel daunting. Note were inadvertently carried over in fund numbers such as: Future Report Development.

Training & Support

Which Training option best suit your learning style? Complete Cognos Report Development Training down to the GL Project Balances report. For more information about this report, visit the Report Development Timeline.

The report provides a summary of a Fin Unit's ending balances by fund, with information from the GL and PPM and drills and dashboards will become available to you in the next year on the Report Development Timeline.

NEW! Report Release: GL Fund Balances

The GL Fund Balances report is now available as a standalone report accessible directly from the Report Development Timeline.

IPPS Hot Topics: Concur Reporting

Have you gotten stuck before trying to get at data coming from Concur or even knowing what's available? Join us for our next IPPS Hot Topics: Concur Reporting. The next session will feature the discussions and report demos to help address some of your frequently asked questions. There may also be opportunities to solidify your knowledge and understanding from a useful and fun information packed session.

Come get your questions answered, system access setups, or helpful hints on the effort report certification process.

Office Hours

Watch recorded office hours and more on our UC San Diego Budget & Finance YouTube channel. If you'll be parking your car at the airport you can take advantage of UCSD's parking rates with various parking providers.

Campus Employees who are seeking Oracle/Concur Approver Roles, please continue to use the Committee interest form we're having difficulty navigating. If you have interest in being a part of this committee, please fill out our IPPS Advisory Committee, attended by several IPPS representatives including our Directors of Procurement and Disbursements/Travel, was originally established to work through ESR changes, enhancements and roadblocks. The committee meets every other Friday, 11:00 AM - 11:45 AM. IPPS uses this time for: originating, working through enhancement ideas, reviewing complicated situations surfaced by IAC members which we either work out in the moment or follow-up with Previewing upcoming developments before they're launched Working through enhancement ideas. UCSD Budget & Finance YouTube channel.

To view the latest informative and entertaining videos, please subscribe to our UC San Diego Budget & Finance YouTube channel.

Committee interest form

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New Knowledge Base Article Alert!

Premier systems, please complete the request on the Health Supply Chain service portal. Doing so will authorize signature of the chart string to send/receive the fund swap

Requesting Oracle/Concur Approver Roles (Health vs. Campus Employees)

For UCSD Health employees looking to request Financial Unit Signature Authorization for invoices for Oracle, Concur and/or Premier systems, please complete the request on the Health Supply Chain service portal. Doing so will authorize signature-related activity from our Health Internal Controls Team.

Improvements to Concur Commitments Update

You can enter the accrual amount in the Concur payment commitment, the Report Header fields populated, even if the travel/event will not take place until after June

Tip: for Concur, move all card transactions from Available Expenses to expense reports with Fiscal Close

If you missed the recent Fiscal Close Bulletins, take a look at the Fiscal Close Bulliten or the TRC Fiscal Close announcement.

Committee interest form

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How Finance-related questions?

Call the UC San Diego Finance Help Link.

How can I do this?

Who can I talk to?

reconciliation of the fund swap

chart string to send/receive the fund swap

Purchase Orders

Overview

The Purchased order process includes: Purchase Order (PO), Requisition, Materials Receipt, & Payment. With the transition to Oracle Cloud, the process has been streamlined with the use of the Cloud Purchase Order. This includes replacing the manual PO process with a streamlined process, reducing the number of steps and improving the overall efficiency of the process.

Features

Oracle Cloud PO includes features such as: Auto-Pick, Auto-Ship, Auto-Invoicing, and Auto-Pay. These features allow for automated processes, reducing the manual effort required and improving the overall efficiency of the process.

Benefits

The benefits of using the Cloud PO include: Reduced manual effort, increased efficiency, and improved accuracy. This allows for more time to focus on other business activities and reduces the risk of errors and delays.

How to Request and Reconcile a Travel Cash Advance

How can I do this?

Who can I talk to?

Precedents

Buyers

Tips & Tricks

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