Budget & Finance Weekly Digest

February 23rd, 2021 - 8th Edition

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Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial

1. Cost Transfers for Concur Documents

- Review the Matrix.
- If you did not provide POET information in your Concur document but now need to complete the appropriate cost transfer request, Matrix can assist you.

2. Cost Sharing

- UC San Diego resources provided directly in support of a project/award.
- Justifications and consequences, and PI/PM notifications.

3. Oracle Procurement

- Instruction on how to default a deliver-to location can be found in our Oracle Procurement Help Page.
- Tips & Tricks: Continue to report all enhancements, new reports, issues, and office hours.

4. Oracle Financials Cloud and Concur Travel & Expense

- See the full write-up of the issues and instructions to resolve.
- If your department has stored copies of the old PDF form please delete them from your drives. The PDF forms are no longer accepted.
- Enhanced turnaround time. Departments are required to input their Financial Unit Approver name directly into the request. The completed request will be routed to the Financial Unit approvers Services & Support approvals queue to support internal financial management of University finances.

5. Payables

- Issues with NIH Awards January 2021.
- University of California Payables invoices cannot be imported to PPM and have delayed ledger close.
- The issue escalated to Oracle for resolution, and as a result, the production environment will be down for scheduled maintenance on 2/23.
- The old PDF form please delete them from your drives.

6. General Ledger

- Magnitude of errors.
- As reported at the end of last year, there were tax posting errors discovered on transactions created in OFC.
- The new form offers full write-up of the issues and instructions to resolve.

7. IT Services

- Oracle Procurement (non-travel related)
- UCSD-DSH Project Cost Transfer Panorama
- UCSD-DSH Accounts Receivable Panorama
- UCS-DSH General Ledger Transaction Details Report
- UCSD-DSH Budget and Financial Management Reports Panorama
- Available Now @ reports.ucsd.edu
- UCSD-DSH BFG Representative by VC Area
- UCSD Travel: Reporting Expenses
- UCSD Travel: Before You Go
- UCSD Travel: Concur Training FAQs
- UCSD Travel: Webinars

8. Finance Steering Committee

- Each Tuesday important updates related to BI & Financial Reporting.
- New Budget & Finance User Group (BFG) Steering Committee on the future financial roadmap for UCSD.

9. Training & Support

- Training day is this Thursday, February 25.
- Register for an Upcoming Webinar.
- Oracle BI team using the UCSD-DSH Project Cost Transfer Panorama
- UCSD-DSH Accounts Receivable Panorama
- UCSD-DSH General Ledger Transaction Details Report
- UCSD-DSH Budget and Financial Management Reports Panorama
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10. Oracle S&S

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- New Budget & Finance User Group (BFG) Steering Committee on the future financial roadmap for UCSD.

11. Budget Requests

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13. New Finance Steering Committee

- BFG Chair, Irene Xavier.
- New budget & finance user group.
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