Upcoming Report Release: Faculty & Researcher Dashboard

On Tuesday, March 15, the Business Intelligence and Financial Reporting team will relaunch an enhanced Faculty and Researcher Dashboard in the campus reporting portfolio, which will provide faculty, researchers, and financial managers with tools and reports to help them navigate the Concur and Oracle Financials Cloud environments more effectively. This dashboard includes features for training and support, streamlined access to key reports, and customizable views to help users find the information they need quickly and easily.

The dashboard includes the following components:

- Financial Unit and Project Validation Rule Implemented Off Scale Salary
- Task 2.2, Budget Amount and Labor Contingency Calculation
- Clinical Trials did not convert for the awards listed
- Revenue balance was not displaying the correct amount consistently.
- The Cumulative Research report on the Project Balances with Expenditure Details (PBED) report displays the budget and revenue balance on sponsored projects. Within the Cumulative Research Report Revenue Corrected
- The Training & Support section above for information about post-release support options.

In addition to these core features, the dashboard also includes an updated Training and Support section with links to relevant courses and resources. The dashboard is designed to be user-friendly and accessible, with intuitive navigation and interactive elements to help users find the information they need quickly and easily.

The dashboard is available to all faculty, researchers, and financial managers who are familiar with policy and would like to learn about the expense reports. This includes preparers, hosts/payees, and faculty and staff who are responsible for budgeting and financial management.

To get started using the dashboard, users should sign into their UC San Diego account and navigate to the dashboard website or download the UC Learning mobile app. The dashboard is optimized for use on desktops and mobile devices, and users can customize their view to suit their needs.

This live course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expense reimbursements. Intended for preparers, hosts/payees, and financial managers who are familiar with policy, this course will provide an overview of the Concur process and help users navigate the system more effectively.

This week we will have open Q&A. Bring your questions and struggles. Nothing a fund manager can’t answer. We want to hear your questions, and have you share with your peers how your program.

On Monday, March 21, 2022 @ 8:00am - 1:00pm, we will have a live course on Concur processes related to meetings, entertainment, and business expense reimbursements. Intended for preparers, hosts/payees, and financial managers who are familiar with policy, this course will provide an overview of the Concur process and help users navigate the system more effectively.

This week's Office Hours will have an open Q&A. Staff and Faculty Tasks 1.2 and 2.2 when using the right-click menu. This week, we will have open Q&A. Bring your questions and struggles. Nothing a fund manager can't answer. We want to hear your questions, and have you share with your peers how your program.

Until March 31, the Campus Budget Office will be hosting Office Hours to support budget and finance-related questions. Each Tuesday, the Weekly Digest provides important updates related to the budget process and financial management. Click here to sign up.

Oracle Maintenance Schedule

Due to this, enhancements to existing Oracle reports and release of new Oracle reports will be temporarily paused so the BI & Financial Reporting team can conduct thorough testing. This will be applied to the financial environment as of March 8, 2022. Related To:

- GSRTF associated with direct retros affecting effort period dates prior to October 2021
- Tuition remission for Instructional Assistants has not yet been processed; it will be posted ahead of the Feb-22 accounting period.
- Corrections to known discrepancies have been processed in the Feb-22 accounting period. Corrections to known discrepancies have been processed in the Feb-22 accounting period.

These changes will be reflected in the budget and expenditure reports in the Feb-22 accounting period. The budget and expenditure reports will be available in the Oracle Financials Cloud environment as of March 8, 2022.

Preauthorize business travel via a Concur Travel Request

Get acquainted with policy and attend our UC Learning live training courses. Be sure to try out the different calendar views in the upper right corner!

UC San Diego Travel: Before You Go

Preauthorize business travel via a Concur Travel Request. Complete/verify your Profile information. Get acquainted with policy and attend our UC Learning live training courses.

UC San Diego Travel: Reporting Expenses

Reconcile/report expenses on a Concur Travel Expense Report (within 45 days after the travel and expense incurred). Retain necessary receipts/scan receipts via the Concur for Mobile App. Complete/verify your Profile information. Get acquainted with policy and attend our UC Learning live training courses.

UC San Diego Travel: After You Go

Complete/verify your Profile information. Get acquainted with policy and attend our UC Learning live training courses.

 oracle.com

Oracle Production Environment Maintenance from Sunday, March 20, 2022 - 7:00pm to Monday, March 21, 2022 - 7:00pm

The Oracle Production environment will be down for maintenance from Sunday, March 20, 2022 @ 7:00pm to Monday, March 21, 2022 @ 7:00pm. If you are a heavy user of the Oracle environment, you may want to consider making the switch to the Oracle test environment.

For more information, please visit the Oracle Maintenance Schedule page on Blink. The Oracle Maintenance Schedule page provides updates and information about upcoming maintenance and outages for the Oracle environment.

Budget & Finance updates

- New Enhancement! Financial Unit and Project Validation Rule Implemented
- Remission for Instructional Assistants has not yet been processed; it will be posted ahead of the accounting period.
- Corrections to known discrepancies have been processed in the Feb-22 accounting period.
- GSRTF associated with direct retros affecting effort period dates prior to October 2021
- No changes were required for the Budgeted Amount or Labor Contingency Savings
- Core recurring total expense totals on Task 4.2 after this change.
- Staff and Faculty Tasks 1.2 and 2.2 when using the right-click menu
- This week, the database was temporarily paused so that we could conduct thorough testing. This will be applied to the financial environment as of March 8, 2022.

The Cumulative Research Report Revenue Corrected

The Cumulative Research Report on the Project Balances with Expenditure Details (PBED) report displays the budget and revenue balance on sponsored projects. Within the Cumulative Research Report Revenue Corrected, the following updates were rolled out in the faculty planning process to align budget data entry with standard central procedures.

- Required in the faculty planning process to align budget data entry with standard central procedures.
- Enhanced Faculty and Researcher Dashboard in the campus reporting portfolio.

Oracle Reporting Technology Upgrade

The Oracle reporting technology upgrade has been completed, and the Oracle Production environment will be down for maintenance from Sunday, March 20, 2022 - 7:00pm to Monday, March 21, 2022 - 7:00pm. This change is temporarily paused so the BI & Financial Reporting team can conduct thorough testing. This will be applied to the financial environment as of March 8, 2022.

Tuition remission for Instructional Assistants has not yet been processed; it will be posted ahead of the Feb-22 accounting period. Corrections to known discrepancies have been processed in the Feb-22 accounting period.

GSRTF associated with direct retrospect affecting effort period dates prior to October 2021.

These changes will be reflected in the budget and expenditure reports in the Feb-22 accounting period. The budget and expenditure reports will be available in the Oracle Financials Cloud environment as of March 8, 2022.

Budget & Finance updates

- New Enhancement! Financial Unit and Project Validation Rule Implemented
- Remission for Instructional Assistants has not yet been processed; it will be posted ahead of the accounting period.
- Corrections to known discrepancies have been processed in the Feb-22 accounting period.
- GSRTF associated with direct retros affecting effort period dates prior to October 2021
- No changes were required for the Budgeted Amount or Labor Contingency Savings
- Core recurring total expense totals on Task 4.2 after this change.
- Staff and Faculty Tasks 1.2 and 2.2 when using the right-click menu
- This week, the database was temporarily paused so that we could conduct thorough testing. This will be applied to the financial environment as of March 8, 2022.

The Cumulative Research Report Revenue Corrected

The Cumulative Research Report on the Project Balances with Expenditure Details (PBED) report displays the budget and revenue balance on sponsored projects. Within the Cumulative Research Report Revenue Corrected, the following updates were rolled out in the faculty planning process to align budget data entry with standard central procedures.

- Required in the faculty planning process to align budget data entry with standard central procedures.
- Enhanced Faculty and Researcher Dashboard in the campus reporting portfolio.

Oracle Reporting Technology Upgrade

The Oracle reporting technology upgrade has been completed, and the Oracle Production environment will be down for maintenance from Sunday, March 20, 2022 - 7:00pm to Monday, March 21, 2022 - 7:00pm. This change is temporarily paused so the BI & Financial Reporting team can conduct thorough testing. This will be applied to the financial environment as of March 8, 2022.

Tuition remission for Instructional Assistants has not yet been processed; it will be posted ahead of the Feb-22 accounting period. Corrections to known discrepancies have been processed in the Feb-22 accounting period.

GSRTF associated with direct retrospect affecting effort period dates prior to October 2021.

These changes will be reflected in the budget and expenditure reports in the Feb-22 accounting period. The budget and expenditure reports will be available in the Oracle Financials Cloud environment as of March 8, 2022.