March 8, 2022

Announcements

Oracle Maintenance Schedule
Oracle production environment will be down for maintenance from Friday, March 18 @ 7:00pm through Sunday, March 20 @ 7:00pm.

Graduate Student Researcher Tuition Remission
Tuition remission for Graduate Student Researchers (GSRTF), for the effort period dates October 2021 - February 2022, will post to the ledgers in the Feb-22 accounting period.

- The GSRTF rates for AY 2021-2022 have been approved and published here under 10/01/2021.
  - Note: you may have to refresh the page if the new PDF does not immediately display.
- GSRTF associated with direct retros affecting effort period dates prior to October 2021 have been processed in the Feb-22 accounting period. Corrections to known discrepancies are underway.
  - If you find an erroneous or missing posting, please submit a ticket through the Services & Support portal with the following fields:
    - About: Financial Accounting
• **Related To:** Graduate Student Financial Administration
  • **More Specifically:** Graduate Tuition & Fee Remission Accounting

  The Graduate Financial Support Unit will continue to work with the Business Intelligence and Financial Reporting teams to enhance reports available for projection and reconciliation.

Tuition remission for Instructional Assistants has not yet been processed; it will be posted ahead of the fiscal year-end closure.

**Oracle Reporting Technology Upgrade**

This month, Oracle will be upgrading some of its reporting technology to improve performance. 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 **not** impact the launch of the Faculty & Researcher Dashboard, nor will it impact the accuracy of the data in existing panoramas or reports. See a full timeline on the [BI & Financial Reporting Bugs & Outages Blink page](#).

---

Watch recorded office hours and more on our [UC San Diego Budget & Finance YouTube channel](#).

**UC San Diego Travel: Before You Go**

**Thursday, March 10, 2022 @ 9:00am - 11:00am**

Faculty and staff who travel or book business travel can further their understanding of preauthorization, booking travel via Concur, prepaying with the Travel & Entertainment Card, and how to take advantage of TripIt Pro. It is recommended that you also attend the *UC San Diego Travel: Reporting Expenses* course before your trip concludes.

---

**Campus Budget Office: Office Hours**

**Thursdays, 10:00am - 11:00am**

Until March 31, the Campus Budget Office will be hosting Office Hours to support budget preparers throughout the planning process. This week’s Office Hours will have an open Q&A.
Fund Management Office Hours

Thursdays, 11:00am - 12:00pm
This week we will have 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.

UC San Diego Travel: Reporting Expenses

Thursday, March 10, 2022 @ 1:00pm - 3:00pm
This course provides an overview of UC San Diego travel policy and the trip reconciliation procedure, including summarized guidelines and on-demand resources. Faculty and staff will learn about the Concur processes for reporting travel expenses on a Travel Expense Report.

Accounts Receivable, Cash, & PPM Office Hours

Friday, March 11, 2022 @ 8:30am - 9:30am
This week, we will cover how to correct rejected invoices in Oracle, followed by an open Q&A session. Bring your questions, comments and your experiences to share with your colleagues across the Campus, we are looking forward to seeing you this Friday.

Faculty & Researcher Dashboard Office Hours

Monday, March 21, 2022 @ 8:00am - 1:00pm,
Wednesday, March 30, 2022 @ 8:00am - 11:30am
An updated Faculty & Researcher Dashboard will be released on Tuesday, March 15. Drop in anytime at either of these post-release support sessions to ask questions about navigating the dashboard or how to interpret the data shown. Please inform the faculty you work with that these support sessions are available for them.

Equipment Asset Management Office Hours

Tuesday, March 22, 2022 @ 8:30am - 9:30am
The Equipment Asset Management team will have open office hours to answer your questions regarding equipment life cycle management, how to navigate CAMS, disposals vs. transfers, and more. We want to hear your questions, and have you share with your peers how your department manages inventorial equipment.
Q&A with UC San Diego IPPS Travel Team
Wednesday, March 23, 2022 @ 11:00am - 12:00pm
Join the UCSD IPPS Travel Team and UCOP’s Central Travel Office for a Q&A webinar on booking travel in Concur. Bring your questions and find out more about our complete managed travel program.

Concur: Event and Expense Reimbursements
Tuesday, March 29, 2022 @ 9:00am - 11:00am
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 and would like to learn about the expense reconciliation process in Concur.

Have Finance-related questions? Call the UC San Diego Finance Help Line.
(858) 246-4237 Tuesdays - Thursdays | 10:00am - 12:00pm & 1:00pm - 3:00pm

Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer Finance-related questions.

Click to access the Event Calendar on Blink, which showcases a consolidated view of Office Hours, Instructor-Led Training sessions, and Hot Topics.
Be sure to try out the different calendar views in the upper right corner!

BI & Financial Reporting

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 Business Analytics Hub. The dashboard’s performance has been improved and will include payroll projections and projection details. See the Training & Support section above for information about post-release support options.
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, the revenue balance was not displaying the correct amount consistently. **This issue has been corrected as of March 2, 2022.** Please keep in mind that the revenue balance report does not show transactions related to CostSharing or Program Income.

Legacy Revenue on Sponsored Initiated Clinical Trials
It was discovered that legacy revenue generated from OCTA Application on Sponsor Initiated Clinical Trials did not convert for the awards listed [here](http://example.com). Sponsored Projects Finance (SPF) is in the process of correcting the revenue and is projected to be completed by the end of April 2022.

Campus Budget Office Updates

Oracle Planning and Budget (EPBCS) Update Alert: Faculty Planning Changes including Task 2.2, Budget Amount and Labor Contingency Calculation
After consultation with Academic Personnel Services, CBO determined that several fixes were required in the faculty planning process to align budget data entry with standard central compensation funding practices. As of Friday, March 4, the following updates were rolled out in the EPBCS production (Planning) environment:

1. Column header updates on Task 2.2 for added clarity:

   ![Column Headers](image)

2. Program Increases are now appropriately applied on top of both “**Scale Pay**” and “**Above and Off Scale Salary**” on Task 2.2 and 2.6.

3. “**Budgeted Amount**” is now calculated as **Budget FTE % * Total Base Salary**.
   
   a. Note: for units showing Labor Contingency savings as of March 4, the amount flowing through to Task 4.2 will have increased based on this logic change. Please double check your core recurring total expense totals on Task 4.2 after this change.
b. No changes were required for the Budgeted Amount or Labor Contingency Savings calculations for Staff planning on Task 1.2.

New Enhancement! Financial Unit and Project Validation Rule Implemented

- **Where this applies:** Staff and Faculty Tasks 1.2 and 2.2 when using the right-click menu options: Add Distribution Line, Transfer Employee, Create Vacant Position, Create Vacancy on Existing Position and Tasks 4.2, 5.1 and 5.2 when using the right-click menu option to Add New Account
- **Result:** If the user enters a Project number from a different Financial Unit than is in the point-of-view (POV) of the form, a new error message will display and the rule will not run and data will not save.

**REMINDER! The FY23 budget entry deadline is Friday, April 1.** At that time, the budget system will be locked for entry and will become view-only for budget preparers.

**Concur Basics**

The [Concur Basics](#) page on Blink provides an overview of how employees with different tasks can utilize Concur. Additionally, it gives insight as to how to engage with our Blink pages, Knowledge Base Articles, and training as a means to help you navigate through the world of Concur and Travel at UCSD.

**Travel Process Overview**

If you are new or planning to travel soon, use this [checklist](#) to navigate the travel pre-authorization, booking, and reconciliation process at UC San Diego.

- **Before You Go on Your Trip**
  - Get acquainted with policy and attend our UC Learning live training courses
  - Complete/verify your Profile information
  - Register guest travelers via Payment Compass
  - Preauthorize business travel via a Concur Travel Request
  - Download the Concur for Mobile App and TripIt Pro
  - Book travel via Concur Travel
  - Apply for the Travel & Entertainment Card
- **During and After Your Trip**
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.**

Not sure where to find answers? Get started using our [Support Framework](#).

[Visit Our Website](#) | [Subscribe to our YouTube](#) | [Contact Us](#)