Announcements

Fiscal Close!

Starting next week, the Weekly Digest will no longer provide updates regarding Revenue on SP Funds Not From Contracts:

- Revenue posted to SP funds incorrectly. Adjustments to the Receipt or Reversal, if needed. To request a reversal, please use the Oracle and Concur Access Monitoring and Deprovisioning form to initiate the process. Please be aware that users with the UCSD GL Journal Entry JR role need to review the Oracle and Concur Role Removal form before submitting the reversal request.

- Ensure all external transfers are properly recorded. If you have a cost transfer in PPM that is charged to the wrong task and/or Funding Source, please contact your Financial Analyst to review and deprovision.

- Clear these entries, but cost transfers may be needed.

- For Oracle and Concur, please review the WalkMe Blink page to learn more about it and download it to your device.

- Please note that this page is subject to updates as new information is added.


Getting Ready for Fiscal Close

We've added a new section in the Weekly Digest to help prepare you for Fiscal Close!

- Department Cutoff Dates: Please note that Department Cutoff Dates are as follows:
  - July 23 - (EOD) VC offices last day to submit exception GL Journal Entry
  - July 24 - (EOD) Department's last day to submit GL Journal Entry

- Oracle Financials Cloud and Concur Travel & Entertainment Card, and how to take advantage of TripIt Pro.

- UC San Diego Travel: Reporting Expenses
  - Thursday, July 29, 2021 @ 1:00pm - 3:00pm
  - In this course, you will learn about Concur processes for prepaying travel and claiming expenses after the business trip occurs.

- Research Administration Training
  - RA Training Fundamentals: Glossary
    - Tuesday, July 13, 2021 & Tuesday, July 27, 2021 @ 11:00am - 12:00pm
  - RA Training Fundamentals: Orientation
    - Tuesday, July 13, 2021 @ 12:00pm
  - RA Training Fundamentals: Post-award Toolbox
    - Wednesday, July 14, 2021 & Wednesday, July 28, 2021 @ 11:00am - 12:00pm
  - RA Training Fundamentals: Post-award Toolbox
    - Wednesday, July 14, 2021 & Wednesday, July 28, 2021 @ 2:00pm - 3:00pm
  - RA Training Fundamentals: Glossary
    - Wednesday, July 14, 2021 @ 10:00am - 11:00am
  - RA Training Fundamentals: Orientation
    - Wednesday, July 14, 2021 & Wednesday, July 28, 2021 @ 12:00pm
  - RA Training Fundamentals: Post-award Toolbox
    - Thursday, July 29, 2021 @ 1:00pm - 3:00pm
  - RA Training Fundamentals: Glossary
    - Thursday, July 29, 2021 @ 11:00am - 12:00pm

- Tips:
  - If you have more than one line in your shopping cart, you can edit billing and shipping addresses into text fields (e.g. Comments) and ensure PII is redacted. If you have any questions about the RA Training program or any issues with your Financial Analyst, please contact them directly.

- Please note: This series is the prerequisite for the RA Training Level 1 Program, which will launch in late August.

- Please visit the RA Training Calendar linked below - more dates will be added soon!

- To register for the Fundamentals onboarding series, please click on the links or email your Financial Analyst.

- Review the Program for more information about the RA Training Program. This will be a gradual rollout of the tiered program, starting with the Post-award Toolbox.

- Please guide staff through this program and recommended systems training.

- The goal is to deliver timely information that matters to you.