The Learning all there is to know about budget & finance can feel daunting.

Familiarize yourself with UC's

Review the

Getting Ready to Travel on University Business?

Getting ready to submit information about these reports, refer to the

Concur Reports

"Receiving award for excellent volunteer service in inclusivity project."

"Reimbursement for travel to UCSD, payee is leading a discussion on cinematography."

As to what the payee is being paid for on the 'Description of Goods and Services' field. This will help IPPS teams to streamline

When sending an invitation to a new payee with PaymentWorks, our recommended practice is to provide detailed information

PaymentWorks Invitations - Description of Goods and Services field

other transactions that are pointing to the legacy Project/Task so that additional expenses don't continue to post in the future.

Allocations and include

journal. Please

The Campus Budget Office can assist with clearing these fund balances (whether positive or negative) via a SOFI swap

operate with SOFI as their main Core Operating Fund (13991). However, in the Oracle transition, some legacy index balances

Chart of Accounts Panorama:

Graduate Student Funding Report:

Enhancement Releases

questions about financial reporting and dashboards/panoramas in the Business Analytics Hub (BAH).

Module discussions and report demos to help address some of your frequently asked questions. There may also be opportunities to

Monday, June 26 @ 11:00am

Reporting Workshop: Dashboard of the Week Series

get your questions answered and solidify your knowledge and understanding from a useful and fun information packed

This week we will be featuring a demo of the newly released Misposted Miscellaneous Receipts on Sponsored Projects. Come

Fund Management Office Hours

Every Wednesday 2:30am - 3:30pm

From now until August 2nd, join the Fiscal Close Office Hours to ask questions and provide feedback regarding fiscal close

Every Wednesday

Watch recorded office hours and more on our

research administrators and fund managers from across the university. It's our way of thanking you for your valuable

celebration, hosted by the Vice Chancellor of Research Affairs and Vice Chancellor Chief Financial Officer, is open to

Save the Dates for our upcoming Research Administrator Appreciation and Fund Manager Summit event! This two-day

Save the Dates!

The Project classifications for PI and Sponsor Initiated clinical trials have been disabled and existing projects have

PADUA

The new department reporting category options,

not currently an ETA for a fix.

Transfer Panorama or review your exceptions in the Panorama or the Manage Project Cost Adjustment Exceptions. There is

The UCSD BI report that is emailed when approved cost transfers are not processed by Oracle isn't sending out the

Cost Transfer Exceptions Report Not Sending All Errors

Oracle production environment will be down for maintenance from

Oracle Financials Cloud Scheduled Maintenance 06/18/2023

- If there are current year expenses posting to the Project/Task linked to the legacy fund #, please process Cost

Full

Full

19942-Nonresident Supplemental Tuition

This report highlights any credits to expense as a potential receipt that may need to be applied to an invoice.

Sponsored Projects should have miscellaneous receipts posted as a credit to expense or applied towards an invoice.

Misposted Miscellaneous Receipts on Sponsored Projects:

Year.

Two additions to Summary Table: Fin Unit Code and Name and Admit Term Year. This table also now sorts by Fiscal

Two new prompts have been added: Hiring Department (returns payroll data only) and Expenditure Type

included: "Academic: Academic Student", "Academic: Medical Residents", and "Student: Casual/Restricted"

For more background information, see the

Budget and Finance Digest from 6/6/23

led to enhanced financial reporting. The new module includes a Financial Reporting Dashboard with the following changes:

2 New Charts

2 New Ability to input short notes

19941-Summer Stipend

19942-Nonresident Supplemental Tuition

" grandfather of the "full" financial reporting module with information available from the previous module.

11.0.0.0.0 - The Warehousing and Reporting Tools now make use of the full Financial Reporting module. This

11.0.0.0.0 - The Warehousing and Reporting Tools now make use of the full Financial Reporting module. This

these changes, the Warehousing and Reporting Tools are now the suite of tools that allow us to create and manipulate financial

These changes may impact some aspects of the Data Warehouse. However, only "new" reports to which this module has

Please contact us if you have any questions or feedback on these changes.

Tips & Tricks

Understanding Oracle Financials Cloud

Home Page

Oracle Financials Cloud is an integrated online platform that provides financial organization and reporting tools, including budgeting, forecasting, reconciliation, and financial analysis. It enables organizations to manage their finances and budgets through a central dashboard, which allows users to access financial information and run reports. The platform also allows for collaboration and communication within the organization, as well as the ability to drill down into data for deeper analysis and insights.

Oracle Financials Cloud is divided into several modules, including Accounting, Cash Management, and Reporting, which together provide a comprehensive financial solution.

Oracle Financials Cloud is implemented and maintained by Oracle, including updates and hotfixes. It is a cloud-based platform, which means it is accessible via a web browser from any device with internet access. It is designed to be user-friendly and intuitive, allowing users to quickly and easily access financial data and reports.

Oracle Financials Cloud is used by many organizations worldwide, including universities and research institutions, for financial management, budgeting, forecasting, and financial reporting. It is a popular choice due to its robust features and ease of use.

Oracle Financials Cloud is an efficient and effective financial management tool that enables organizations to improve their financial processes, increase transparency, and make informed decisions. It is an essential tool for organizations looking to stay ahead of the financial curve and ensure long-term financial stability.
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.