Announcements

Oracle 3i Office Hours Dates on June 30
Carynthia Balance Final and Account 300806
As we approach the new fiscal year, we want you to update our data environment that will support our fiscal year adoption.
Oracle only reflects the end position on the entity/final level, UC San Diego Balance being reported. We recognize that Oracle is a tool to view information from the Financial Unit and Project level.
The central Oracle team is currently reviewing the impacted reports to ensure existing reports will not reflect the year-end data in the current fiscal year instead of Account 300806 for all managerial P&L reporting.
For a demonstration and further Q&A, please attend the Oracle 3i Office Hours on Wednesday, June 30 @ 1:00pm. Link to join: https://ucsd.zoom.us/j/93680320405
Stay tuned and check your inbox for additional guidance, including community asked questions.

Upcoming IPPS Office Hours Schedule
In observance of the Independence Day Holiday, IPPS will not be hosting Office Hours on July 5th. (Weekly Office Hours on June 28th and July 2nd) will be posted to the schedule. The regular Office Hours schedule will resume starting July 5th.

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: Next Up
- July 7: (B) Foundation and Director of Finance.- Last day to request drawdowns from the Foundation.
- July 7: (B) AR Billing: - Non-student/non-patient AR invoices must be in Oracle. Note: the effective date on the invoices must be the date the services were provided or the goods shipped.
- July 8: (P) Payroll Cost Transfer: - Self-service cost transfer in Oracle PPM will not be allowed after July 8.
- July 8: (B) Recharges via University or Application: - For activities having significant work in progress, work completed through June 30 should be included. - Unprocessed errors must be resolved by this date.
- July 8: (R) Recharges using RMBF or AP: - Last day to upload and submit invoices.
- July 8: (R) (B) Financial Unit and Project level: - Self-sufficiency agreements will be posted after July 8.
- July 9: (B) Close deadlines: - June Payroll costs posted to Deferrals from Deferral to Project in Oracle with close approved on July 9.

Information on Department Action and Cutoff dates for Fiscal Closing 2021-2022 is posted to Blink. Please note that this page is subject to change and updates on our website becomes available. Look back to the Blink page at regular intervals.

Tips & Tricks

General
Here’s how to invite Supplier Contacts to Payment Compass
Payment Compass is a tool used to manage the payments and reconciliations for non-vendor/payees at UC San Diego. You can invite a contact to view their non-employee payees at UC San Diego. You can invite a contact to view their existing payee/supplier profile per the instructions in our new KBA.
Payment Compass is a tool used to manage the payments and registrations for non-vendor/payees at UC San Diego. You can invite a contact to view their existing payee/supplier profile per the instructions in our new KBA.
How to Invite Supplier Contacts to Payment Compass

Concur Travel & Expense
Business Meetings and Entertainment
Information regarding COVID-19/Event Planning and Attending can be found to return to Leaves and Entertainment, you are delivered to your inbox. The below list is a sample of the current Event Meeting guidelines in addition to UC Entertainment Policy requirements when handling一事 as a personal event and attending the Event Compass for our purposes.

Adding Significant Allocation Data
When creating an allocation with your chart string, verify that you have added all of the COA’s (Fund, Financial Unit, Approver, Function) under PFIET (Projects, Task, Expenditure Type) values required for the Concur document. If your
Project is a Sponsored Project (begins with SP), please be sure to enter a Funding Source, or we will allow your Request and Expense Requests to successfully pass validation.

About the Weekly Digest
Each Tuesday important updates related to Budget & Finance, including Oracle BI Office Hours, are delivered to your inbox.
Our goal is to deliver timely information that matters to you.

Contact us
Have questions about this edition? The best way to contact our team is via Services & Support.

Budget & Finance Support
feedback, ideas, and communications is vital to enhancing the financial health and success of University of California San Diego.

University of California San Diego
We make great strides in improving our financial management, and your feedback is key.

Services & Support
Feedback Form