Announcements

Oracle 9i Office Hours Dates on June 30
Carynthian Balance-Fixed 9/30 Acquired 30/06
As per the newly approved financial year, we wanted you to update on the data movement and support for our financial system, Oracle. Only reflects the end position on the entity/fund level, UC San Diego's balancing movement that will support our financial year's consolidated statement. Oracle only reflects the end position on the entity/fund level, UC San Diego's balancing movement that will support our financial year's consolidated statement. Oracle only reflects the end position on the entity/fund level, UC San Diego's balancing movement that will support our fiscal year's consolidated statement.

Fiscal Closing Special Items Instructions

The central Oracle team is currently revising the impacted reports to ensure accurate reporting from the previous year's account 300000 for all managerial P&L reporting. For a demonstration and further Q&A, please contact the Oracle 9i Office Hours on Wednesday, June 30 at 2:00pm (EOD) via https://ucsd.zoom.us/j/93680320405.

Step 1: Identify potential tax issues. Each fiscal year's financials and activities are delivered to your inbox. Our goal is to deliver timely information that matters to you.

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TIPS & TRICKS

Tips & Tricks
General

How to Invite Supplier Contacts to Payment Compass

Payment Compass in a tool used to manage the payments and reconciliations for invoices/payables invoices at UC San Diego. You can invite a contact to view their existing payee/supplier profile per the instructions in our new "Contact Information" section. You can invite a contact to view their existing payee/supplier profile per the instructions in our new "Contact Information" section. There are several additional items available through the use of this system or email, so take the time to check them out. Existing payments can be found on the "Payouts" link below the "Finance" link at regular intervals.

Concur Travel & Expense

Business Meetings and Entertainment

Information regarding COVID-19 (in-person) and Attendance will be found in the "Details" page of the "In-Person" event. If host is actively working online, follow these guidelines in addition to the "In-Person" requirements when handling non-personal event and following the Event Details as listed.

Adding Sufficient Allocation Data

When creating an allocation with your chart string, verify that you have added all of the COA (Fund, Financial Unit, Approver, Function) and/or POET (Project, Task, Expenditure Type) values required for the Concur document. If your allocation is a Sponsored Project (begins with SP), please be sure to enter a Funding Source as well. The Concur document will complete the allocation process.

Another important item is to enter all of the COA (Fund, Financial Unit, Approver, Function) and/or POET (Project, Task, Expenditure Type) values required for the Concur document. If your allocation is a Sponsored Project (begins with SP), please be sure to enter a Funding Source as well. The Concur document will complete the allocation process.

Information on Departmental Action and Cutoff dates for Fiscal Closing 2020-2021 is posted to https://blnk.ucsd.edu. Please note that this page is subject to change and updates on our website becomes effective as listed in this article at regular intervals.

About the Weekly Digest

Each Tuesday important updates related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense, are delivered to your inbox. Our goal is to deliver timely information that matters to you.

Contact us

Have questions about the edition? The best way to contact our team is via services@ucsd.edu.

BUDGET & FINANCE WEEKLY DIGEST

June 29, 2021 - 26th Edition

President Michael V. Drake

About this edition

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Department of Services & Support
Title: Director of Services & Support