Announcements

Oracle 3i Office Hours Dates on June 30
Carynthian Balance Format (Drive: Accessed 39086)
As we approach the next fiscal year, we want you to update on the data for the month of financial processes for the fiscal year. Oracle only reflects the positions on the financial data. Please be sure to check your mailbox for directions.

The central Oracle team is currently revising the impacted reports to ensure compliance with the revised financial data. We recognize that this is a new process for the Financial Unit and Project-level.

For a demonstration and further Q&A, please attend the June 30th Oracle Office Hours on Wednesday, June 30th, 2:00pm. Link: [Join us](https://ucsd.zoom.us/j/93680320405)

Stay tuned and check your inbox for additional guidance, including a summary of today’s guidance.

Upcoming IPS Office Hours Schedule
In observance of the Independence Day Holiday, IPS will not be hosting Office Hours on July 4th. However, Office Hours (June 28th and July 5th) will be held to discuss scheduled topics. The regular Office Hours schedule will resume starting, July 12th.

Getting Ready for Fiscal Close
We added a new section in the Weekly Digest to help prepare you for Fiscal Close.

Departmentik Fall Dates: Next Up
- (EOD) Default Projects from Default project in Oracle with final approval by EOD 7/9
- (EOD) AR Billing - Non-student/non-patient AR invoices must be turned in to Oracle. The default module on the invoices must be the date when the invoices were provided or the goods shipped.
- (EOD) PPM Cost Transfer - Self-costing transfer in PPM is required.
- (EOD) Recharges via API for Application. For activities having significant work-in-progress, the work must be completed by June 30th. Unprocessed entries must be resolved on this date.
- (EOD) Recharges using RFP No AR- Last day to submit and will expire.
- (EOD) - Cost of Goods-Self funding institution. Self-submitting comments can be posted after 7/9.
- (EOD) Total deadline to transfer June Payroll costs posted to Deferrals from Deferrals in Oracle with final approval by EOD 7/9

Information on Department Action and Fall Dates for Fiscal Closing 2020-2021 is posted to Blink. Please note that this page is subject to change and updates on the following becomes available later in the week, update it at regular intervals.

Tips & General

General
Here’s how to invite Supplier Contacts to Payment Compass
Payment Compass is a tool used to manage the payments and reconciliations for sponsored projects at UC San Diego. You can invite a contact to view their existing supplier/supplier profile per the instructions in our new KBA. There are several other FAQs available to help you use the system, so be sure to check them to select the Payment Compass in the Knowledge Base.

Concur Travel & Expense
Business Meetings and Entertainment
Information regarding COVID-19 and Event Planning and Attending is to be found on the Lunch: Business Meetings and Entertainment event in guidelines in addition to UC Events website. The supporting events guidelines are updated on an ongoing basis to reflect any changes in the event calendar.

Adding Sufficient Allocation Data
When creating an invoice or with your chart string, verify that you have added all of the COA to the Financial Unit, Approved Function (under the POE Field, Project, Task, Expense Type) and that forms the Concur document. If your Project is a Sponsorized Project (begins with SP), please be sure to enter a Funding Source as well. This will allow your Request and Expense Reports to successfully pass validation.

About the Weekly Digest
Every 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 and relevant 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 некоммерческие услуги, комментарии и обсуждение формируются в целях информационной поддержки и не связанны с текущими и предстоящими событиями.

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