Budget & Finance Weekly Digest

Volume 1 Issue 24

June 21, 2021

Welcome to our newest edition of the Budget & Finance Weekly Digest. This edition includes tips and tricks to help you navigate the fiscal year-end process, information on fiscal year-end dates, and updates on Procurement and Concur. Enjoy!

Tips & Tricks

Getting Ready for Fiscal Close

We've updated a new feature in the Fiscal Calendar to make your close process easier. The new feature enables you to add events to the Calendar and set reminders for upcoming deadlines. For more information, please visit the Budget Calendar.

Fiscal Year Calendar

June 21 - (5:59am) UCPath - (NON High Risk) Monthly Direct Retro
June 22 - (2:30pm) Ecotime - Monthly Timekeeping entry deadline for the current period
June 23 - (EOD) Concur- Last day for Final Approval of PCard Expense
June 23 - (EOD) Services & Support IPPS D&T - Last day to submit use
June 24 - (3:00pm) Biweekly UCPath deadline to establish new hires
June 24 - (EOD) IPPS-Last day to submit Inter-Fund
June 25 - (EOD) Financial Services - PPE 6/26/2021; Pay date 7/07/2021
June 25 - (EOD) Services & Support IPPS D&T - Last day to submit use
June 26 - (5:59am) UCPath - (NON High Risk) Monthly Direct Retro
June 26 - (EOD) IPPS-Last day to submit Inter-Fund
June 27 - (EOD) Financial Services - PPE 6/26/2021; Pay date 7/07/2021
June 28 - (EOD) Services & Support IPPS D&T - Last day to submit use
June 29 - (EOD) Financial Services - PPE 6/26/2021; Pay date 7/07/2021
June 30 - (EOD) Financial Services - PPE 6/26/2021; Pay date 7/07/2021

Additional Resources

- Technical Guide: Tips for Managing Concur
- UCPath Knowledge Base Articles
- Concur Knowledge Base Articles

About the Weekly Digest

Each Tuesday important updates related to Budget & Finance, including Oracle Procurement and Concur are delivered to your inbox. Our mission is to provide you with timely and relevant information to help you make informed decisions.

Contact Us

If you have any questions or comments, please contact us at finance@ucsd.edu.

Oracle Procurement Weekly Update

The Oracle Procurement Department has made several updates to the system to improve user experience and functionality. Please visit the Oracle Procurement website to learn more about the latest updates.

Student Financial Services

The Student Financial Services Department has released a new tool to help students manage their financial aid. Please visit the Student Financial Services website to learn more about this new tool.

Oracle Procurement Concur Update

Please ensure that any non-employees have been invited to register or have access to Concur. Doing so will cause reimbursement. Please refrain from directing non-employees and sponsored affiliates to process their own reimbursements via Concur. UC San Diego needs to be the one to log in to Concur and process their reimbursement. If the payee is not a current UCSD employee, then a faculty or staff member at UC San Diego needs to be the one to log in to Concur and process their reimbursement. Please visit the Concur website for more information.

Hot Topics: Budget Dates in Oracle Procurement

During the checkout process, the individual submitting the requisition has the option to split their order amongst multiple chart strings or projects. Refer to our new theme for more information on how to do so.

Additional Resources

- Technical Guide: Tips for Managing Concur
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Oracle Procurement and Concur. Watch as our instructors review best practices and known transitional issues impacting financial processes and matters to you.

Oracle Procurement Concur Update

There are several updates available for selection when submitting a Procurement Card Expense Report in Concur. These updates include new Concur Expense Type, New Account code, and KBAs in sync with the releases. Enhanced user navigation, we will actively work to keep training updates are released, including updates released to campus in phases over the next few weeks. The new theme is part of a larger enhancement project that we initiated transition to a new theme.

Oracle Procurement Concur Update

This new theme is part of a larger enhancement project that we initiated transition to a new theme. As of Monday, June 21, users will notice a new look and improve navigation on the Oracle Sign In page. Oracle Concur has been moved to the left-hand side of the sign in page and other known transitional issues will be addressed.

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial system. Please visit the Budget & Finance website for more information.

Tips & Tricks

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