Getting Ready for Fiscal Close

Announcements

New Report Release: Transaction Details - The new Transaction Details report is available on the Financial Accountability tab of the Business Analytics Hub. The new report includes the following additional features:

- New options to identify transactions as revenue
- Ability to compare current transaction with prior transactions
- Simultaneous search for both PPM and General Ledger transactions using a single set of prompts

Effective immediately, to ease the reconciliation of projects and improve controls, departments across the University will discuss the proper way to manage equipment fabrications from inception to close.

Effective May 11, 2022:

- If you need assistance with the Missing Receipt feature, you can visit the UC San Diego Finance Help Line or call the UC San Diego Finance Help Line. Knowledgeable agents are standing by to assist you.

Invoices under $5,000 coded as equipment:

- Fabrication costs on non-fabrication tasks
- Costs posted after the project end date
- High-risk expenditure types on sponsored projects

For questions on the guidance or the checklist, please consider attending the UC San Diego Finance Help Line or call the UC San Diego Finance Help Line. Knowledgeable agents are standing by to assist you and answer your questions.

Tips & Tricks

- Review the new Missing Receipt Declaration feature.
- Use the Transaction Details report to identify transactions that require a receipt.
- Watch a recording of the Missing Receipt Declaration feature.

BI & Financial Reporting

Related to:

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About:

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Oracle: Buying and Paying for Financial Unit Approvers

- Continue the discussion on physical inventory and learn how to update asset record fields on CAMS with the Equipment Asset Management team.

- Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer your questions.

- For more information on navigating the report and related features, please visit the BI & Financial Reporting section.
Our goal is to deliver timely information that matters to you. Not sure where to find answers? Get started using our Support Framework.