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October 19, 2021 | 42nd Edition

Announcements

2021 Year-End Management Reporting Processes Approaching

The annual management reporting (MMR) process is the year-end financial closing and reporting activity for the 2021 fiscal year. For more information, please contact预算办公室的工作人员.

FY22 Core Recurring Budget & Finance CMS Update

The Budget Plan in the Oracle Planning and Budgeting (EPBCS) tool has been updated to reflect the activity of the FY22 budget development process. The Budget Plan includes Early Salary and Benefits Planning assumptions at the time of the budget plan. Funding approved during the FY22 Budget Cycle is transferred as a lump-sum and transacted at the Financial Unit – Fund – Function – Project – Account (774900) level. Prior or new funding approved during the FY22 Budget Cycle is transferred as 1/12th monthly allocations at the Financial Unit – Fund – Function – Project – Account (774950) level. For steps to locate the Core recurring resource allocations using the Campus Budget Office KBA, please visit the following link: Click here for more details.

FY22 Core Recurring Budget & Finance CMS Update

For steps to locate the Core recurring resource allocations using the Campus Budget Office KBA, please visit the following link: Click here for more details.

FY22 Budget & Finance CMS Redesign

Thank you for your continued support! We look forward to bringing you more exciting updates as we continue working on the Budget & Finance CMS Redesign. Thank you for your continued support!

Training & Support

New Budget & Finance Blink Updates

This section also features Chart of Accounts guidance to help you navigate the Oracle financial system.

In partnership with the Research Administration Training Program, Holly Paiva from the Campus Budget Office will demo several GL-based reports developed by her office for fiscal year operational based reports. She will also discuss chart of accounts (COA) best practices: what are they, when should you use them, and how can you integrate them into your day-to-day work? This Thursday's office hours will be Thursdays @ 11:00am - 12:00pm.

Instructor-Led Training sessions, and Hot Topics. Be sure to try out the different calendar views in the upper right corner!

Wednesday, October 27, 2021 @ 11:00am - 12:00pm

Hot Topics: Understanding POETAF

This Thursday's office hours will be Thursdays @ 11:00am - 12:00pm

Thursday, October 21, 2021 @ 9:00am - 11:00am

UC San Diego Travel: Reporting & Expenses course before your trip takes place. You are recommended that you also attend the UC San Diego Travel: Reporting & Expenses course before your trip takes place. You will demo several GL-based reports developed by her office for fiscal year operational based reports. She will also discuss chart of accounts (COA) best practices: what are they, when should you use them, and how can you integrate them into your day-to-day work? This Thursday's office hours will be Thursdays @ 11:00am - 12:00pm.

Thursday, October 21, 2021 @ 1:00pm - 3:00pm

Research Administration Resources

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