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January 26, 2021 - 4th Edition

Budget & Finance Weekly Digest

Searching for COA/POETAF Values in Concur

Please be sure to select the Code filter when searching for COA or POETAF values in Concur. For more information on searching for COA/POETAF Values in Concur and Concur Role Request, please click here.

Cost transfer initiator and approver roles are now requested through the Level 4 Financial Unit. To learn more, read KBA: 0545991. This knowledge base article describes how to search for the Cost transfer initiator and approver roles.

Tips & Tricks

The Cumulative Research Report is now available under Budget & Finance at reports.ucsd.edu. The audience for this report are financial offices looking to reconcile the NGN Recharge Summary Report is now available under Budget & Finance at OFC Chart String report is now available under Budget & Finance at budget.ucsd.edu. BI & Financial Reporting: Transaction/Reconciliation Dashboard is now available under BI & Financial Reporting at portal.ucsd.edu. Each Tuesday important updates related to Budget & Finance, including Oracle Financials Cloud and Concur, are delivered to your inbox. Our goal is to deliver timely information that matters to you.

Oracle Financials Cloud

Oracle Financials Cloud (FP) is the University’s primary tool for financial data users with budget and actual revenue/expenditure details. To access these reports, click here and point to BI & Financial Reporting Series, specifically the Project Reporting Series, to view schedule.

Focusing on What Matters

Oracle Financials Cloud includes several Key Performance Indicators (KPIs) that will help Financial Management track the budget on a regular basis. Oracle Financials Cloud provides quick and timely access to financial information.

Announcements

Oracle PPM Award Temporary Extension

The Oracle PPM Award Temporary Extension is the interim process for award extensions in December 2020 and 2021. The Payment Compass webinar is a series that covers navigation of the IPPS is continuing their recurring webinar series on Payment Compass into 2021. The Payment Compass webinar series on Payment Compass into 2021. The Payment Compass webinar series on Payment Compass is a great tool for streamlining the invoice approval process and automating the approval of invoices.

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Hot Topics: POET Information in Oracle Procurement and Concur

In direct response to feedback received since the November 4 Town Hall, 5 new roles have been created to support the project for the end of the month. The next steps include updating the POET information in Oracle Procurement and Concur for both POET and POETAF. We will be updating these roles to support the project.

The Report ID, a longer alphanumeric value, remains visible to Concur users and saved links may no longer work.

OFC Chart String Validation Update

In direct response to departments' feedback, the new validation rule applied to Chart String will be removed. The rule change is an enhancement to the project's requirements.

Oracle PPM Project Name Changes

Oracle roles by domain) cannot access to Oracle roles?

Oracle PPM General Projects

Submit a new request for Oracle PPM General Projects to the Finance Office. The next step is to submit the request for the next set of projects.

Oracle & Concur Approvers (Request for Oracle Concur Expense: Report Key

Use the key that appears beside the Report ID in the Concur Expense Report.

Oracle PPM Sponsored Project

Oracle PPM Sponsored Project is now available under BI & Financial Reporting at reports.ucsd.edu. Oracle PPM Sponsored Project provides the capability to view and manage projects and project-related transactions in Oracle Financials Cloud.

Oracle PPM Project Adjustments JR Role

Oracle elevated roles were assigned to several project team members. These roles provide access to the project budget and project-related transactions in Oracle Financials Cloud.

Oracle PPM Project Request Form

Oracle PPM Project Request Form includes a variety of options for project managers. The next step includes submitting the request form in Services & Support. Reminder, Cost Transfer Initiator and Approver roles are now requested through the Level 4 Financial Unit. To learn more, read KBA: 0545991.

Oracle PPM General Projects

Submit a new request for Oracle PPM General Projects to the Finance Office. The next step is to submit the request for the next set of projects.