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Budget & Finance Weekly Digest

University of California San Diego, 9500 Gilman Drive, La Jolla, CA, 92093

This knowledge base article describes how to search for the Cost Allocation (COA) and Project Order Entry and Tracking (POET) values by numeric code (rather than by text) in Concur. For more information on searching for COA/POET Values in Concur, refer to our Knowledge Base article on this topic.

The NGN Recharge Summary Report is now available under Budget & Finance reporting. The report provides an overview of award and contract budget activities and internal recharges posted to the department ledgers. To learn more, read KBA: 964511.4.0.

The OFC Chart String report is now available under Budget & Finance reporting. This report provides financial data users with budget and actual revenue/expenditure details. To learn more, read KBA: 987461.4.0.

Oracle PPM Award Temporary Extension is the interim process for requesting a temporary extension on a Sponsored Project to allow continued spending until award modification is received. The process has been modified to better communicate the best intentions to stakeholders involved.

Impact of Chart String Validation Update

In direct response to feedback received since the November 4 Town Hall, 5 enhancements to existing reports completed, a webinar series (see BI & Financial Reporting Series, specifically the Project Cost Transfers & Updates training) has been created to support project and grant management via online video resources.

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Oracle BI Report SDLC

On the next page, in the BI & Financial Reporting Series, a webinar on E-Billing and the University's E-Billing process is available. This webinar will provide an overview of the financial reporting and payment processes and provide an opportunity for questions and answers.

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

Oracle Authors should review the Transition to DEV4 and implementing security standards throughout all Oracle reporting environments.

SAP Concur removed visibility of the Report Key field from the user interface. This change was made in an effort to improve user experience and ensure compliance with legal and regulatory requirements.

The Chart String field is no longer visible to the user; however, the Chart String will still be visible to department fund managers.

Corrective actions by department fund managers.

Most requests will be handled daily. If you require immediate attention, please contact jayная@ucsd.edu. At least one request will be handled daily.

You can now view, search and filter budget details and reports needed to manage department financial activities and construct financial statements.

Oracle PPM General Project Request

Oracle PPM General Project Request enables the PPM project cost transactors to maintain an overview of actual project cost transfers and information. To learn more, read KBA: 951322.4.0.

On the next page, in the BI & Financial Reporting Series, a webinar on E-Billing and the University's E-Billing process is available. This webinar will provide an overview of the financial reporting and payment processes and provide an opportunity for questions and answers.

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