April 20th, 2021 - 16th Edition

Budget & Finance Weekly Digest

Information System and Support Departments’ Success in Managing Fiscal Responsibilities

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial system and support departments’ success in managing their fiscal responsibilities. The new Procure-to-Pay Panorama provides 30 new and updated reports and additional features to improve reporting on the financial status of the university. Visit reports.ucsd.edu for a list of topics covered by Panorama.

New Oracle BI Report Released: UCSD-DSH Procure to Pay Panorama

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Tips & Tricks

Favorite Allocations

If you are familiar with the Concur interface and currently have a Concur profile, you can select your Favorite Allocation. This will allow you to save Allocation information and easily apply it to future reports. To do so: Select your Favorite Allocation. This will allow you to save Allocation information and easily apply it to future reports. To do so:

- Select the Allocation that you wish to save to your profile.
- Click the Add button from an Expense Report.
- Save the Allocation information and easily apply it to future reports.

Favorite Allocations

Note that Favorite Allocations do not save across different Concur profiles.

Punchout Items with Purchasing Categories

If you are purchasing an item via a punchout in Oracle Procurement, you may create a Favorite Allocation. This will allow you to save Allocation information and easily apply it to future reports. To do so:

- Select the Purchasing category so you may continue with your order.
- You can select the Purchasing category in the Concur: Event Expense Reports Training Video.

UCSD Travel: Reporting Expenses

Please note that you can also search “Concur” in the UC Learning Center to browse through instructor-led Concur courses. This course will be available in the eCourse Library at reports.ucsd.edu.

UCSD Travel: Before You Go

This is not an introductory course. Participants should first complete the UCSD Travel: Reporting Expenses course. The course will include more in-depth explanations of changes to the University Procurement Card Program.

Join the IPPS Team for the next session of Hot Topics! This session will focus on the Fund Management Training Series. The team will review best practices, provide a live tutorial, and host Q&A.

Available as of today, a Procurement Card Cardholder can submit a Procurement Card Delegation of Authority Request, delegating the authority for travel preauthorization, booking travel via Concur, prepaying with the Travel and Event Services Card, and claiming expenses after the business trip occurs. The Procurement Card Delegation of Authority Request is a ONE-TIME submission of the Procurement Card Delegation of Authority Request, delegating the authority for travel preauthorization, booking travel via Concur, prepaying with the Travel and Event Services Card, and claiming expenses after the business trip occurs. Don’t miss it!

Panorama will provide you with the interactive tools you need to gather insights and easily apply it to future reports. To do so:

- Select your Favorite Allocation.
- Click the Add button from an Expense Report.
- Save the Allocation information and easily apply it to future reports.

Final Financial Reporting

May 3rd, 2021: Procurement Card (P-Card) training for P-Card holders is in the works! This training will be delivered via virtual sessions and will provide P-Card holders with the information they need to ensure that their transactions are properly reported in the financial system. The training will cover topics such as P-Card transactions, expensing, and reconciling accounts.

UCSD Travel: Before You Go

This is not an introductory course. Participants should first complete the UCSD Travel: Reporting Expenses course. The course will include more in-depth explanations of changes to the University Procurement Card Program. Participants will review best practices, provide a live tutorial, and host Q&A.

Additional Guidance can be found at reports.ucsd.edu.

Restructure PPM General Projects and Project Personnel Assignments

As communicated in Restructure PPM General Projects and Project Personnel Assignments, revenue correctly allocated. Additional Guidance can be found at reports.ucsd.edu.

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Additionally, if you are aware of any invoices that you do not anticipate the revenue, you should submit those invoices through the OFC expenses system. Revenue will be assigned when the OFC transaction is properly processed. Don’t miss it!