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.

Tips & Tricks

1. Select Favorite Allocations

Select your Favorite Allocation button from an Expense Report. This will avoid the need to re-add the favorite allocation to your report. Each Tuesday important updates related to the Concur system will be communicated in the Budget & Finance Weekly Digest.

2. Add Favorite Allocation

If you enter in multiple chart string allocations on an Expense Report, consider creating a Favorite Allocation. This will allow you to save Allocation information and easily apply it to future reports. To do so:

a. Click the Select Your Favorite Allocation button.

b. Enter the chart string allocation details.

c. Click the Add button.

3. Replace Allocations

If you are purchasing an item via a punchout in Oracle Procurement, you may encounter issues where the punchout items do not utilize Purchasing Categories. We will add a tool so you can easily align these items to Purchasing Categories.

Punchout Items with Purchasing Categories

Tips & Tricks

1. Process Concur Delegation of Authority Requests

Concur best practices, provide a live tutorial, and host Q&A.

2. Restructure PPM General Projects (Update of 4/16/21)

Restructure PPM General Projects and Project Personnel Assignments.

3. Claim Unidentified Receipts

Friendly reminder: we have noticed an increase in issues concerning invoices that were created outside of the financial system. All invoices (except for those from students/patients) that were created outside of the financial system. All invoices (except for those from students/patients) that were created outside of the financial system.

Announcements

Oracle Financial Cloud

Oracle Financial Cloud is the university’s solution for end-to-end financial processes. This solution integrates accounting, general ledger, procurement, travel and expense management, and much more.

Oracle Financials Cloud Panorama

Oracle Financials Cloud Panorama is available at the University of California San Diego. This Panorama offers high-level dashboard views and reporting needs related to Requisitions, Purchase Orders, and Invoices within Procure to Pay Panorama. The reports provide users with insights into their transactional data, such as the status of their requests and the financial impact of their actions.

Oracle Financials Cloud Panorama

Oracle Financials Cloud Panorama is a new tool that provides high-level dashboard views and reporting needs related to Requisitions, Purchase Orders, and Invoices within Procure to Pay Panorama. The reports provide users with insights into their transactional data, such as the status of their requests and the financial impact of their actions.

BI & Financial Reporting

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