Assigning delegates.

They go to act as your delegate. Refer to our full guidance on the steps:

1. Log in to Concur Travel & Expense
2. Go to Delegate Settings
3. Click on "Delegate Settings" to prevent sending Concur notification emails to specific users
4. Select your Department > Click on "Delegate Settings"
5. Select your Department > Click on "Delegate Settings" to change your delegate permissions

Providing Delegate Access

- The departmental Representative maintains the shared account for the remaining duration of the project.
- The departmental Representative can remove the delegate at any time by changing the delegate permissions.
- The departmental Representative will also need to set up Oracle Procurement. Our instructors will be reviewing Oracle Procurement and helpful hints for managing your PPM ledger.

New Business Analytics Hub

The Business Analytics Hub, formerly known as reports.ucsd.edu, has had a facelift!!! Don’t worry – all the Budget & Finance reports are still available in the new Business Analytics Hub. Head on over using the new URL bah.ucsd.edu

Tips & Tricks

- Visit the Oracle Transactional Business Intelligence (OTBI) for Financials Cloud and Concur Travel & Expense options available through the UC Learning Center.
- The course will include more in-depth explanations of changes to the terminology and concepts.
- Reimbursements. Intended for preparers, hosts/payees, and financial managers.
- The live training course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expenses.
- The first NCE request for an award should include the completed, signed instructions.
- The Authorized Organizational Representative must notify the Grants Administration that extensions are needed, please contact your OCGA Officer for specific instructions.
- If a revision on the final Federal Financial Report is necessary:
  - The notification must indicate why the revision is necessary and describe what action is being taken by the recipient to preclude similar situations in the future.
- The notification must highlight the end of the project or fulfill the closeout requirements at the end of the project period.
- The Authorized Organizational Representative must ensure that all Federal Financial Reports are submitted and that all funds are accounted for before the project end date, to ensure that NCEs are obtained in a timely manner.