Budget & Finance Weekly Digest

March 29, 2021

1. Expense Reports and Assigning Delegates

- To assign delegates to your Concur profile, please be sure to check all of the boxes on the "Delegate Settings" page.
- Delegates can only see expenses and projects for the user they are assigned to.
- Delegates will also have access to the "Delegate" tab in Concur, which allows them to view and edit their own information.

2. Lift PO Commitments in Oracle Procurement

- If you are noticing PO commitments on your PPM ledger, you may lift them by following these steps:
  1. Navigate to Oracle Procurement.
  2. Use the "Lift PO Commitments" option to remove the commitments.
  3. Update your PPM ledger to reflect the changes.

3. The Business Analytics Hub

- The Business Analytics Hub, formerly known as reports.ucsd.edu, has had a new look and feel!
- Visit the main page to browse through instructor-led Concur courses.
- Please note that you can also search "Concur" in the UC Learning Center to find more resources.

4. Oracle Procurement Training

- Join the IPPS Team for the next session of Hot Topics! This session will focus on Concur best practices, provide a live tutorial, and host Q&A.
- Wednesday, April 28, 2021 @ 11:00am - 12:00pm

5. Reviews of Financial Policies

- The Authorized Organizational Representative must notify the Grants Administration office if any financial policies are being changed.
- This action is necessary to ensure that all policies are being reviewed and updated.

6. NIHGPS Section 8.4.1.5.3

- The Authorized Organizational Representative must notify the Grants Administration office if any financial policies are being changed.
- This action is necessary to ensure that all policies are being reviewed and updated.

7. Financials Cloud and Concur Travel & Expense

- Each Tuesday important updates related to Financials Cloud and Concur Travel & Expense are released.
- Subscribe to our mailing list to receive these updates.

8. Oracle Transactional Business Intelligence (OTBI)

- Oracle Transactional Business Intelligence (OTBI) for Financials Cloud is now available.
- This tool provides users with the ability to create custom reports and analyze financial data.

9. Oracle Best Practices

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

10. Fund Management Training Series

- The Fund Management training series is being held every Tuesday at 11:00am - 12:00pm.
- Visit the main page to browse through instructor-led Concur courses.
- Please note that you can also search "Concur" in the UC Learning Center to find more resources.

11. Contact Us

- Have questions about this edition? The best way to contact our training team is via email at trainingservices@ucsd.edu.
- We are committed to maintaining and protecting privacy for individuals and the information they provide us.
- With the expanded privileges, please remember that UC San Diego is committed to不断扩大 access across the board to help drive reporting.
- We look forward to hearing from you soon.

About the Weekly Digest

Each Tuesday important updates related to Financials Cloud and Concur Travel & Expense are released. Subscribe to our mailing list to receive these updates. To learn more, visit https://act.ucsd.edu/sparcm/sparc-dept-home.shtml

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