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Budget & Finance Weekly Digest

University of California San Diego, 9500 Gilman Drive, La Jolla, CA, 92093
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Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial systems and processes. This page provides updates on how to use the Concur Travel & Expense platform.

Providing Delegate Access

Assigning delegates.

They go to act as your delegate. Refer to our Expense Reports. Without this access, they will only see a Blank screen when the boxes to give your delegate full access to your Concur Requests and process is outlined in our KBA.

New KBA: How to Remove Delegate Email Notifications in Concur

Update for Current Users: KBA to remove Delegate Email Notifications in Concur

Providing Delegate Access is a crucial task for ensuring smooth financial operations. It allows authorized personnel to access your Concur requests and process without the need for additional permissions. This KBA provides instructions on how to assign delegates and prevent the sending of Concur notification emails to specific users.

Concur Travel & Expense

New KBA: How to Remove Delegate Email Notifications in Concur

The KBA outlines the process for removing delegate email notifications in Concur, as well as the necessary permissions and actions required. This ensures that only authorized personnel can access your requests and provides a streamlined approach to delegate management.

New KBA: How to Remove Delegate Email Notifications in Concur

This KBA is designed to help users understand the process of removing delegate email notifications in Concur, ensuring that only designated personnel can access your requests. It provides a comprehensive guide to delegate management and email notification removal.

Oracle Procurement

New KBA: Oracle Inquiry Role Update

As an update to the basic Oracle access granted in recent weeks, we will begin granting additional access through the AR Inquiry and reporting role. This will allow users to access reports in Oracle Inquiry and perform closeout procedures for invoices.

New KBA: Oracle Inquiry Role Update

This KBA focuses on the Oracle Inquiry Role Update, providing details on the expanded access granted through the AR Inquiry and reporting role. It highlights the importance of this update and outlines the criteria for accessing additional reports.

Oracle Financials Cloud

New BI Author Course in UC Learning!

Take a deeper dive into Oracle Transactional Business Intelligence (OTBI) for Oracle Financials Cloud. This introductory course is designed for those familiar with policy and would like to learn about more advanced data criteria building, filters, views and more.

New BI Author Course in UC Learning!

This course introduces Oracle Transactional Business Intelligence (OTBI) for Oracle Financials Cloud, providing a comprehensive overview of data criteria building, filters, views, and more. It is ideal for users looking to deepen their understanding of OTBI.

Grants Administration

Reminders of NIH Policies Related to Closeout

Per NIH guidance, it is suggested that a No Cost Extension (NCE) be processed in the event that additional time is needed to complete the aims of the project or fulfill the closeout requirements at the end of the project period. This form may be submitted to Grants Administration closeout.

Reminders of NIH Policies Related to Closeout

This notice serves as a reminder of NIH policies related to closeout, emphasizing the importance of timely processing of No Cost Extensions. It highlights the need for adherence to NIH guidance in ensuring the timely completion of project objectives.

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