Delegates KBA

Oracle Transactional Business Intelligence (OTBI) for Financials KBA has been published outlining the guidelines to adjust your Financials reports. This guidance can help you with any Variances that you notice in your Financials reports. Please review the KBA and follow the instructions. Delegates are encouraged to work with their OCGA Officer or Grants Fiscal Administrator to make any necessary updates to the financial reports.

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 for broader access for reporting.

Lift PO Commitments in Oracle Procurement

If you are noticing PO commitments on your PPM ledger, you may lift them by going to the AR Inquiry and Reporting role. For more information, please review the KBA titled "Oracle Inquiry Role Update".

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 to explore the new tools and features.

Budget & Finance Weekly Digest

Each Tuesday important updates related to Budget & Finance, including Oracle Procurement, Card Access, and Concur best practices, are delivered to your inbox. Our goal is to deliver timely information that matters to you.

The report can be filtered by column: Click on Show “All” entries to display all columns. By default, the report is sorted by Title. You can also sort by other columns by clicking on the column headings. The report can also be exported to Excel.

Filter by Action: Filter by action as needed, including open, pending, closed, and waiting actions. These filters allow you to target specific groups of project summarized in your action.

Filter by Period: Filter by date range to display projects that have started, are ongoing, or that have ended and use the report that lists all financial reports due that month.

Filter by Fund: Filter by fund code to display projects that are associated with a specific fund. This filter allows you to target specific groups of project summarized in your fund.

Filter by Department: Filter by department to display projects that are associated with a specific department. This filter allows you to target specific groups of project summarized in your department.

Filter by Status: Filter by status to display projects that are in a specific status. This filter allows you to target specific groups of project summarized in your status.

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If you have any questions or feedback about the weekly digest, please contact us at budget.financials@ucsd.edu. We are here to help you.

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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.

Concur Travel & Expense

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