February 9th, 2021 - 6th Edition
Budget & Finance Weekly Digest

Tips & Tricks

Concur Internet Browser Recommendation
Faculty and staff can easily capture receipts and track business expenses with Concur. Visit the Concur Mobile App, then join the Faculty and Staff Concur Chat group on Teams!

Organization fields), it is important to properly complete the billing section to ensure your purchase will be charged. If you are using a project but do not populate the project name, the transaction will be charged to the default fund/organization instead. For more about how to do so in our ERP tools, please see the Oracle Procurement walkthrough of the Role Request process.

How to Complete the Billing Section in Oracle Procurement

When submitting a shopping cart to become a requisition in Oracle Procurement, use the POETAF number to properly charge the purchase. When creating a requisition, use the STaRT tool: POETAF and Chart String to ensure transactions are posted to the correct fund. When entering采购 items, enter the necessary POETAF number. PRNs are not required in the requisition if the POETAF number is entered correctly.

Revenue & Resources Not Showing on Tasks

When running reports of revenue and resources, ensure that the report is being run at the fund level. This will allow you to add a filter for the specific chart string. You can also use the Business Intelligence (BI) Consumer to run reports of revenue and resources at a chart string level.

When running the Revenue and Resource report, it is critical to select the correct chart string. If you have been using 20001 and 20003 as your fund, please use 20002 instead. This will allow you to accurately display revenue and resources on the appropriate chart string.

When running the Revenue and Resource report, select the chart string that corresponds to your department. If you are using 20001 or 20003 as your fund, please use 20002 instead. This will allow you to accurately display revenue and resources on the appropriate chart string.

Employee Check Deposits

When depositing a check issued in January, please select the appropriate year from the drop-down menu when depositing the check. This will ensure that the check is properly recorded in the system. If you are unable to select a specific year, please contact the Finance Services and Support team to resolve the issue.

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UCSD-DSH Chart of Accounts Panorama

Starting February 1st, this new report will be available at reports.ucsd.edu > HR/Payroll. This report provides a comprehensive overview of the DSH Chart of Accounts, allowing users to easily access information on budget, revenue, and expenses. The report is designed to be user-friendly and provide valuable insights into financial processes and impacts.

We thank you for your patience as the team works to provide new guidance on Revenue & Resources Not Showing on Tasks. This one-time issue has been known to impact the reporting of revenue and resources in the BI Consumer. The team is currently working on a solution to resolve this issue, and they will be providing updates as they become available.