Budget & Finance Weekly Digest

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Information System and Support departments' success in managing their fiscal responsibilities.

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial system.

Check out this new video on approver roles in Concur. The video covers topics:

- Concur Approvers: Role Request Video
- Digitize Receipts with the Concur Mobile App

Ensure the PO and any associated invoices show on the PPM ledger. Learn while on the go with the Concur Mobile App.

Organization fields (Project, Task, Expenditure Type, and Expenditure) are important to properly complete the billing section to ensure the POET information (Project, Task, Expenditure Type, and Expenditure) is correct and your purchase will be charged.

If you are using a project but do not populate the project information, such as cardholder/employee name, for better reporting and search purposes.

Oracle Financials Cloud, Concur, and Oracle Procurement Blink pages may be affected. Please visit reports.ucsd.edu for the latest links!

UCSD-BIP Project and Task DFF's (Non-Sponsored) and UCSD-DSH General Accounting Panorama Reports Now Available at Finance Community of Practice (CoP) to get the latest tips & tricks!

Oracle BI Consumer - Tip of the Week!

We are thrilled to see an average of 50+ users in the BI & Financial Reporting Office Hours Special Edition on Tuesdays @ 9:30am for support submitting or approving a request. You can also request topics for the Office Hours by clicking here.

Register for an Upcoming Webinar!

Frequently in our sessions, we see people who are familiar with policy and would like to learn about more advanced automation and reporting. There are options out there to help with this, starting with the simplest to the more complex.

Reimbursements. Intended for preparers, hosts/payees, and financial managers.

Continue to report all enhancements, new reports, issues, and office hours. We thank you for your patience as the team works to provide new guidance on the topics impacted by the limitations in Concur.

Top of the Line

We are excited to share the results of our recent survey. We asked our community how they are finding success in using Concur. They shared that they are:

- Using it for expense reimbursement
- Using it for policy enforcement
- Using it for audit compliance

We received 100% positive feedback on the following:

- Concur Approvers: Role Request Video
- Digitize Receipts with the Concur Mobile App

With these new features, Concur is becoming an even more powerful tool for organizations.

Confidentiality Statement

This message contains information that is privileged. Please direct any questions to:

- Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense
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