February 9th, 2021 - 6th Edition

Budget & Finance Weekly Digest

To continue receiving our emails, add us to your address book.

---

**Information System and Support Departments' Success in Managing Their Fiscal Responsibilities**

For best performance, Concur should be used on the latest version of Google Chrome.

**Check out this new video on approver roles in Concur.** The video covers topics such as how to configure Concur to support your specific business needs.

**Oracle Financials Cloud**

Watch recorded office hours with the Oracle BI team as they share essential how-to information for customizing your Oracle reports and dashboards. To find out more, visit reports.ucsd.edu under Budget & Finance.

Continue to report all enhancements, new reports, issues, and office hours on the Finance Community of Practice (CoP) to get the latest tips & tricks!

---

**Reports Now Available at Reports.ucsd.edu under Budget & Finance!**

---

**Oracle BI Consumer - Tip of the Week!**

There are specific Oracle reporting topics you want to learn!!

---

**Weekly Office Hours:**

2/25/21: Oracle BI - Transaction Dashboard

2/18/21: Oracle BI - Project Cost Transfers & Updates

---

**Oracle BI Consumer - Tip of the Week!**

If you try to submit a new transaction with a new chart string using one of the above process; with the new CVR, this will no longer work but is also no longer needed.

---

**Oracle Procurement - Tip of the Week!**

Any check issued since January 1st, 2021 can now be deposited or cashed. If you bank is charging you a fee to reprocess the check, or if you no longer have the check, please stop payment on the check and correct.

---

**Oracle BI Consumer - Tip of the Week!**

The live training course will include an in-depth explanation of Concur functionality, including how to access information, and other key concepts to help navigate the every day when it comes to payables.

---

**Oracle BI Consumer - Tip of the Week!**

The University "Payables: The Elements of Accounts Payable" training provides a baseline overview of the various sources of payables transactions, how COA and POETAF drive the posting of these transactions, the flow of a transaction through the payables process, and the impact of errors and exceptions on the process.

---

**Oracle BI Consumer - Tip of the Week!**

Projects, budget should not be confused with resources. A budget will help to determine how resources are used to achieve an objective, whereas resources are the actual thing that is used to achieve the objective. Projects are the means by which objectives are achieved. The PPM module is designed to support the project management process relating to the allocation of resources to projects. Generally, a project is a temporary activity designed to produce a unique product, service, or result. Budgeting is the process of setting revenue and expense targets for a specified time period.

---

**Oracle BI Consumer - Tip of the Week!**

The new chart string validation rules (CVR) will be (re)implemented this Friday, February 5th, and the new chart string validation rules (CVR) will be implemented this Friday, February 5th.

---

**Oracle BI Consumer - Tip of the Week!**

Starting February 1st, this new report will be available at reports.ucsd.edu > Personnel Expense Projection Report

---

**Oracle BI Consumer - Tip of the Week!**

The projects and budgeting process helps to determine how resources will be used to achieve objectives. However, a budget is not a guarantee that resources will be used in the most effective manner. A budget should be designed to provide a baseline for resource allocation and expenditure control, and to help determine the outcomes of projects and programs.

---

**Oracle BI Consumer - Tip of the Week!**

Requests for General Project budgets will not be approved at this time as the requestors have not completed the P&L report.

---

**Oracle BI Consumer - Tip of the Week!**

PPM Budget Updates on General Projects

---

**Oracle BI Consumer - Tip of the Week!**

Register here for the Concur: Event and Expense Reimbursements Course to learn how to access information, and other key concepts to help navigate the every day when it comes to payables.

---

**Oracle BI Consumer - Tip of the Week!**

The projects and budgeting process helps to determine how resources will be used to achieve objectives. However, a budget is not a guarantee that resources will be used in the most effective manner. A budget should be designed to provide a baseline for resource allocation and expenditure control, and to help determine the outcomes of projects and programs.

---

**Oracle BI Consumer - Tip of the Week!**

The projects and budgeting process helps to determine how resources will be used to achieve objectives. However, a budget is not a guarantee that resources will be used in the most effective manner. A budget should be designed to provide a baseline for resource allocation and expenditure control, and to help determine the outcomes of projects and programs.

---

**Oracle BI Consumer - Tip of the Week!**

How to Edit and Delete Concur Requests and Expense Reports

---

**Oracle BI Consumer - Tip of the Week!**

Oracle Procurement - Tip of the Week!

—

UC San Diego
Copyright © 2021 UC Regents