February 9th, 2021 - 6th Edition

Budget & Finance Weekly Digest

Information System and Support Department’s Success in Managing their Fiscal Responsibilities

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial information system and support department’s success in managing their fiscal responsibilities.

Concur Internet Browser Recommendation

When on the go with the Concur Internet Browser, use the Concur Mobile App to Digitize Receipts. Ensure the PO and any associated invoices show on the PPM ledger. Learn how to complete the billing section to ensure the PO and any associated invoices show on the PPM ledger. Learn more.

Oracle Procurement

When submitting a shopping cart to become a requisition in Oracle Procurement, be sure to properly complete the billing section to ensure the PO and any associated invoices show on the PPM ledger. Learn more.

If you are familiar with policy and would like to learn more advanced terminology and concepts, register for the upcoming webinar on terminology and concepts.

Oracle BI Team Webinar

Register for an upcoming webinar on Oracle BI & Financial Reporting:

- Project Cost Transfers & Updates
- BI & Financial Reporting: Project Cost Transfers & Updates
- Oracle Requester Role and Concur Delegates
- Bi-Weekly Office Hours: Where are my SubAccounts?
- Bi-Weekly Office Hours: Emphasis on Authors - Dashboards
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New Chart String Validation Rules

Oracle Financials Cloud and Concur Travel & Expense reimbursements processes related to meetings, entertainment, and business expenses are now automated for sponsored projects. Some departments used REQ instead of the ORCBL fund when creating requisitions. To ensure accuracy, please update these fund values in Oracle and Concur for your requests.

UCSD-BIP Project and Task DFF’s

Reports now available in reports.ucsd.edu under Budget & Finance! Be sure to tune in to the Finance Community of Practice (CoP) to get the latest tips & tricks.

Weekly Office Hours

Join us two office hour sessions this week. Please continue attending office hours and let us know if anything matters to you.

Payment Processing

Register for the Payables Webinar to learn more about payment processing.

Taking a Baseline Overview

The process of setting revenue and expense targets for a specified budgeting period is called budgeting. Budgets are developed to project, guide, evaluate, and control future financial activities. Budgets feeding from Oracle Budget (EPBCS) into PPM General Projects.

ORCBL Budgets

Projects, budget should not be confused with resources. A budget will help to ensure that funds are wisely allocated and error-free. Most importantly, it contradicts the PPM module’s design, which is intended to track expenses against budget performance.

UCPath Integration

These fund values in Oracle and Concur for your Requests, Expense Reports and Requisitions. For pending Oracle or Concur procurement, use these fund values in Oracle and Concur for your Requests, Expense Reports and Requisitions. For pending Oracle or Concur procurement, use these fund values in Oracle and Concur for your Requests, Expense Reports and Requisitions.

Reports and Requisitions

New chart string validation rules. Otherwise, update to another fund value.

New Chart String Validation Rules

How to Complete the Chart String Validation Rules

How to Complete the Chart String Validation Rules in Oracle and Concur. The team has been working hard to update these rules. You can now update your chart strings in Oracle and Concur. We thank you for your patience as the team works to provide new guidance on these rules.

Concur Travel & Expense

Register for the Concur: Event and Expense Reimbursements Course. The course will be led by central offices with more comprehensive training and support.

Oracle Requester Role and Concur Delegates

Travelling to Submit an Oracle Requester Role and Concur Delegates? We have some insight on how to do this more efficiently.

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