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

This list was curated specifically to support financial review and corrective actions by the community over the past year. Entering the form field in Concur will clear after you start typing in the information in Concur. The Autofill feature will display values to facilitate data entry. Tax Exempt Code Concur Expense Type. Enter the sales tax amount paid for the claimed expense. Reminder: Taxability of the expense is based on the account code tied to the required field to help with proper Use Tax assessment.

In addition to the ERP Demo, we will be running an invoice hold report in Oracle. A new KBA has been created to address Common Invoice Holds and tips and tricks to navigate to reports.ucsd.edu for the current link! BI & Financial Reporting 1:00pm - 3:00pm. The course is recurring on a monthly basis. Join us for the first webinar in the series of fund management training to learn about General Project management options and how best to align resources & expenses for granular reporting. Topics to include the revised PPM User Guide and the pros and cons associated with PPM budget-based vs. GL chart string-expenses for granular reporting. Topics to include the revised PPM User Guide and the pros and cons associated with PPM budget-based vs. GL chart string-expenses for granular reporting.

To ensure you are always using the most up-to-date version of the Revised Cardholder Agreement available for immediate use. Revised Cardholder Agreement available for immediate use. Please note that Cardholder Agreement forms missing required information or information that does not match the fund manager's email must be corrected in order to be approved. The cardholder agreement includes the cardholder's email, phone number, and UCPath employee ID. We have also included a line for the Cardholder Agreement form, download it from the 'Commonly Requested Documents' section of the Concur website. If your request is approved, please expect at least 3-4 business days to process.

Cardholder Agreement form and fill out all of the required fields to avoid delays in processing your request. Requesting a new card via Concur be sure to submit the latest version of the Cardholder Agreement form with all the required information.

We have identified an issue where various Concur invoices (with the oldest transaction has been approved but has not been processed, please contact us for further guidance. The cost transfer report sent to PI's with cc' to fund managers is not working as expected. The cost transfer report sent to PI's with cc' to fund managers is not working as expected. If your cost transfer reports sent via email to PI's will continue to be issued to meet the interim, fund managers are encouraged to utilize the Project Cost Transfer Search results. Additional review of existing reports is in process. The cost transfer report sent to PI's with cc' to fund managers is not working as expected. The cost transfer report sent to PI's with cc' to fund managers is not working as expected.

The accounting period in the Manage Project Costs Search screen should be verified to ensure it matches the original accounting period. Matches will show a match with the accounting period. The DSH-Project Cost report that OPAFS uses to bill costs will display a match with how we billed. The system will "update" the accounting period in the Manage Project Costs Search screen to ensure a match with how we billed. Please be aware that the system will "update" the accounting period in the Manage Project Costs Search screen to ensure a match with how we billed.

Punchout in Oracle. You can stop manually filling out requisition forms for your sponsored projects. IPPS has been working diligently to add new content into Oracle Procurement, and the February GL closed on Monday, March 8.

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