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Budget & Finance Weekly Digest

University of California San Diego, 9500 Gilman Drive, La Jolla, CA, 92093

After clicking into the form field, the auto-fill will clear after you start typing in the entry, but these selections do not transfer to Concur.

Google Chrome's Autofill feature might interfere with entering your chart string.

Reminder: Taxability of the expense is based on the account code tied to the expense types and taxability, the Oracle Use Tax Correction.

In addition to Expense Types, Sales Tax vs. Use Tax, and the Oracle Use Tax Correction, the Procurement Card Tax Process.

Concur Travel & Expense

Common Invoice Holds

Tips & Tricks

The Project Balances with Expenditure Details report has been enhanced, so we can provide more information about General Project management options and how best to align resources & fund management: PPM General Project Structure Options.

The live training course will include an in-depth explanation of Concur advanced buying terminology and concepts. The course is recurring on a monthly basis.

Join the IPPS Team for the next session of Hot Topics! This session will focus on PCard Blink page and will be held on 3/11 from 9:00am - 11:00am. The course is recurring on a monthly basis.

Visit the Training & Events Calendar for information on upcoming webinars.

February Ledger Close

Oracle Financials Cloud

* Oracle guidelines and procedures for the next year*

Please note that Cardholder Agreement forms missing required information will be deleted from your drives.

If your department has stored copies of old agreement forms, we recommend deleting them from your drives.

Submit a new cardholder request. If your department has stored copies of old agreement forms, we recommend deleting them from your drives.

Revise the Department Administrator Name, signature, and email address. When submitting a revised agreement, you will be prompted to include the cardholder's email, phone number, and location.

Revised Cardholder Agreement available for immediate use.

Cost Transfer Known Issue

The cost transfer report sent to PI's with cc' to fund managers is not working as expected. The Oracle BI team will turn off the fund manager's cc' notification.

The cost transfer report sent to PI's will continue to be issued to meet compliance requirements.

We have identified an issue where various Concur invoices (with the oldest date 2/17) did not properly load in Oracle and are working on getting invoices processed, with a status of the transfer as "Pending Approval." This is due to 1) the Oracle outage on 02/12/21 or 2) a known bug with Oracle.

For cost transfer reports sent via email to PI's, we are working on a solution to address campus inquiries and key topics that matter to fund managers. Join us for the next course on 3/16 from 9:00am - 11:00am.

For helpful guidance on Concur agreement forms, we recommend deleting them from your drives.

Contact us

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About the Weekly Digest

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