For further troubleshooting assistance on COA/POETAF errors, please refer to the Concur documentation or contact the Oracle Procurement support team. Transactions will fail to reconcile if the date of the transaction falls outside of the project dates. For example, transactions dated 09/30/2021 cannot be reconciled with a project that has a date range of 01/01/2021 to 12/31/2021.

When transacting in Concur, please keep in mind the start and end dates for Project Start and End Dates. Incorrect dates can lead to the failure of transactions to reconcile. Projects must have valid start and end dates to properly reconcile.

The sponsored projects team from Accounting & Financial Reporting may provide additional guidance on reconciliation procedures. They can be reached at SPFFinance@ucsd.edu.

Please refer to the Concur documentation for detailed instructions on reconciling expenses. Faculty and staff are encouraged to review the reconciliation procedure, including summarized guidelines, resources, and tips on how to avoid common errors.

Our new webinar series offers training for faculty and staff on various topics related to Concur. The webinar on November 1, 2021, at 1:00pm will provide an overview of the UC San Diego travel policy and the travel expense reimbursement process. This course will be recommended that you also attend the UC San Diego Travel: Reporting course before your trip takes place.

UC San Diego Travel: Before You Go

Thursday, October 21, 2021 @ 9:00am - 11:00am

This course will provide an introduction to travel plans, including reserved accommodations, car rentals, and transportation. Faculty and staff will learn about Concur, the Travel & Entertainment Card, and how to take advantage of TripIt Pro. It is especially valuable for individuals responsible for departmental purchases who need to process nonPO payments, and checking invoice status. This course will be required prerequisite for registration.

Oracle: Buying and Paying for PO Requisitions

Tuesday, October 12, 2021 @ 1:30pm - 4:00pm

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as shopping for and purchasing goods and services, creating PO requisitions, and processing nonPO payments. Participants will learn how to accurately record cost transfers, POETAF request and transaction reconciliation.

Current and prospective cardholders will learn about updates to the card agreement, including changes to rewards and benefits. This course is designed for faculty and staff who travel or book business travel, and will be especially useful for those who are responsible for departmental purchases.

Oracle: Payable Reimbursement Process

Thursday, October 7, 2021 @ 9:00am - 11:00am

This course will provide an overview of the Oracle Procurement & Payables process, including how to create and process invoices. Participants will learn how to accurately record cost transfers, POETAF request and transaction reconciliation.

Paying in your Projects

Friday, October 8, 2021 @ 9:00am - 11:00am

This course will provide an overview of the Oracle Procurement & Payables process, including how to create and process invoices. Participants will learn how to accurately record cost transfers, POETAF request and transaction reconciliation.

Please refer to the Concur documentation for detailed instructions on reconciling expenses. Faculty and staff are encouraged to review the reconciliation procedure, including summarized guidelines, resources, and tips on how to avoid common errors.

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