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

### Tips & Tricks

**What is the difference between a Concur Expense Type and a PPM Buying Goods & Services?**

1. **Expense Type**: These represent one of the standard expense categories such as Travel, Entertain, and Subsistence. Concur requires you to select an expense type in order to properly categorize your expenses.
2. **Buying Goods & Services**: These represent the specific line items you are buying. When you create a purchase order in Concur, you will need to specify the specific goods or services you are ordering.

### Training & Events Calendar

- **New Videos on the Travel Process: Travel Request & Expense Report**
  - **Date**: April 12th
  - **Time**: 9:00am - 11:00am
  - **Register**: https://www.zoom.us/j/99721743737
  - **Description**: This video will provide an overview of the new travel request and expense report process, including Concur’s new Concur Travel Expense Report. View the video [here](https://www.youtube.com/watch?v=Qw2yX5ZQZ5w).

- **Concur: Event and Expense Reimbursements Live Training Course**
  - **Date**: April 14th, 2021
  - **Time**: 9 - 10:30am
  - **Description**: This course will cover the latest changes to Concur and the event and expense reimbursement process. Topics include Default Projects, Purchase Orders and Commitment Reconciliation, Exception reporting, & Cost transfers. For an end-to-end overview of creating a Travel Request, check out the video [here](https://www.youtube.com/watch?v=Qw2yX5ZQZ5w).

### Financial Reporting

**New Oracle BI Report Released: Financial Deficit Report - Operating Funds**

- **Details**: This report displays all financial unit/fund deficits in excess of $25,000 as of April 1st. It is intended for financial unit/fund managers to understand their deficit status.
- **Publication Date**: April 6th, 2021
- **URL**: [View](https://reports.ucsd.edu)

- **Oracle PPM Initiatives**
  - **Oracle Financials Cloud**
    - **Topics**: Revenue, Intercampus transfers ILTF, and associated reports.
  - **Marketplace**
    - **Details**: Access to all historical Marketplace order information will still be available from April 12th. If you still have Marketplace Favorites that you reference, please log in to your Marketplace account. The way you will log in won't change; the homepage will be identical to what you have been used to. In a couple of weeks, Marketplace will be transitioning away from individual accounts and will offer access to Favorites and Queries and Favorites.

- **View Supplier Addresses in Request Forms**
  - **Description**: Oftentimes when you select a supplier in a request form in Oracle Procurement, the Supplier Site (or address) automatically defaults. There are some situations, however, where you will need to select the proper site to which your PO is going. To help you with this selection, we have created an article that explains how to properly select the proper site to which your PO will be directed.

- **Oracle Procurement B2B Integration**
  - **Details**: If you are noticing PO commitments on your PPM ledger, you may reduce the PO to what has been invoiced via a change order. This may cancel the PO via a change order. If the PO has been partially invoiced, you may reduce the PO to what has been invoiced and close out the PO in Oracle Procurement. If the PO has not been invoiced, you may lift the commitments by closing out the PO. A change order allows you to modify the PO to reflect the actual invoice and close out the PO. This is a common practice when POs are issued in advance of the goods or services being delivered.

- **New Card Request via Concur**
  - **Instructions**: As of April 1st, card requests in Concur with a home address listed will NOT be approved and will be returned to the requester. This process change is to align with Balboa Travel’s new shipping process.
  - **Process Change for Shipping a New Corporate Card to a Home Address**: As of April 1st, card requests in Concur with a home address listed will NOT be approved and will be returned to the requester. This process change is to align with Balboa Travel’s new shipping process.

- **Tips & Tricks**
  - **How to choose the right travel supplier when you’re not sure?**
  - **What is the difference between a Concur Expense Type and a PPM Buying Goods & Services?**
  - **What does Concur FAQ mean?**

### Contact Us

If you have questions about the information in this document, please reach out to us via email at budget@ucsd.edu or call 858-822-3100.