Budget & Finance Weekly Digest

For University of California San Diego, 9500 Gilman Drive, La Jolla, CA, 92093
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Information System and Support Departments' 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 departments’ success in managing their fiscal responsibilities.

FAQs

Budget & Finance Support provides answers to common questions.

Expenditure Type?

What is the difference between a Concur Expense Type and a PPM expenditure type?
In the Concur Expense Type, Concur uses the term “Expenditure Type” to define the nature of the transaction. Here is the list:
1. Professional Services
2. Supplies
3. Software
4. Travel
5. Transportation
6. Utilities
7. Other

In PPM, an expenditure will be classified under the service or resource to which it is assigned. To see the specific classifications in PPM, search for the expenditure and look under the “External Revenue” category. The service or resource category will be listed under the “Revenue” table.

What is an activity-based cost?
In PPM, an activity-based cost is a cost that is associated with a specific activity. It is a cost that is directly related to a particular task or project.

What is the difference between a Concur expense type and a PPM expenditure type?
In Concur, an expense type is defined by the nature of the transaction. In PPM, an expenditure type is classified under the service or resource to which it is assigned.

FAQs on how Concur Expense Types are defined:

1. Professional Services:
   - Professional Services - Consulting
   - Professional Services - Education
   - Professional Services - Training
   - Professional Services - Engineering
   - Professional Services - Research

2. Supplies:
   - Supplies - General Supplies
   - Supplies - Office Supplies
   - Supplies - IT Supplies
   - Supplies - Medical Supplies

3. Software:
   - Software - Purchased
   - Software - Subscription
   - Software - Cloud

4. Travel:
   - Travel - Airfare
   - Travel - Hotel
   - Travel - Car Rental
   - Travel - Meals & Incidentals

5. Transportation:
   - Transportation - Ground Transportation
   - Transportation - Air Transportation
   - Transportation - Water Transportation

6. Utilities:
   - Utilities - Electric
   - Utilities - Gas
   - Utilities - Water
   - Utilities - Internet

7. Other:
   - Other - Other

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Concur New Card Request via Concur Travel & Expense
You may view each address in full by hovering over the text.

If you still have Marketplace Favorites that you reference, please log in to Marketplace and export them by clicking "Download Marketplace Favorites". This list was curated specifically to support financial review and reporting. You can see the addresses associated with these items in the Budget and Financial Management Reporting Panorama. For questions, please contact us via Services & Support.

B & M Financial Reporting

TIPS & TRICKS

Tips: Excel

Default Projects, Purchase Orders, and Commitment Reconciliation
Each Tuesday important updates related to Financials Cloud and Concur Travel & Expense are published in the Budget & Finance Weekly Digest. The goal is to deliver timely information that may impact your daily work.

About the Weekly Digest

For questions, please contact us via Services & Support.

Have questions about this edition? The best way to contact us is via Services & Support.