Management of Transactions

In the past, sending funds to your campus's PPM system was a complex process. Now, Concur allows you to easily send funds by setting up a receivables account. This tutorial will walk you through the set-up process and show how to send funds via Concur.

FAQ Blink Page

What is the difference between a Concur Expense Type and a PPM Expense Type?

In Concur, Expense Types are used to categorize expenses for reporting and analysis purposes. They are associated with the Concur Expense Report, which is generated at the end of the reporting period. Expense Types are defined by the user and can be customized to meet specific needs.

In PPM, Expense Types are used to categorize expenses for financial planning and analysis purposes. They are associated with the Financial Deficit Report, which is generated at the end of the reporting period. Expense Types are defined by the financial department and are used to allocate expenses to different cost centers.

In the Concur Expense Report, you can view expenses by Expense Type and analyze data to identify trends and areas for improvement. In the Financial Deficit Report, you can view expenses by Expense Type and assess the impact of financial deficits on the organization.

Concur FAQ

Can I view addresses associated with purchases in Concur?

Yes, you can view addresses associated with purchases in Concur. When creating a Concur request, you can enter the address information for the purchase, such as the address for shipping and handling. You can also view addresses associated with previous purchases, such as the address for a vendor or supplier.

View Supplier Addresses in Request Forms

Oracle Financials Cloud

Tips & Tricks

New Oracle BI Report Released:

Financial Deficit Report - Operating Funds

This report is for operating funds only. A similar report for Sponsored Project funds will be available soon. The report displays all financial unit/fund deficits in excess of $25,000 as of the reporting date. Financial deficits in excess of $25,000 cannot be carried forward unless an approved resolution plan is in place in accordance with the campus deficit policy found here: https://blink.ucsd.edu/finance/budget/deficit-policy-and-monitoring.html#Policy

This report displays all deficits as of the reporting date. It defaults to show deficits for the current month. You can select any date range in the past 12 months. You can also filter the report by financial unit, fund, or unit/fund combination.

Oracle BI & Financial Reporting

1. Financial Deficit Report
   - Date Range: 04/01/21 - 04/31/21
   - Financial Unit: Accounting
   - Fund: University
   - Report Display: All Deficits

2. Financial Deficit Report - Operating Funds
   - Date Range: 04/01/21 - 04/30/21
   - Financial Unit: Accounting
   - Fund: University
   - Report Display: All Deficits

3. Financial Deficit Report - Sponsored Project Funds
   - Date Range: 04/01/21 - 04/30/21
   - Financial Unit: Accounting
   - Fund: University
   - Report Display: All Deficits

4. Financial Deficit Report - Federal Funds
   - Date Range: 04/01/21 - 04/30/21
   - Financial Unit: Accounting
   - Fund: University
   - Report Display: All Deficits

5. Financial Deficit Report - State Funds
   - Date Range: 04/01/21 - 04/30/21
   - Financial Unit: Accounting
   - Fund: University
   - Report Display: All Deficits

6. Financial Deficit Report - Other Funds
   - Date Range: 04/01/21 - 04/30/21
   - Financial Unit: Accounting
   - Fund: University
   - Report Display: All Deficits

About the Weekly Digest

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