Announcements

Cost Transfer Frequently Asked Questions

Cost Transfer

Knowledgeable agents are standing by to assist you and answer your questions.

First Step: Transfer one of the splits to the new project.

I need to do a partial transfer. What do I do?

Find the new splits and highlight the line to be transferred to a new project (Tip: hover your mouse over the line and click the yellow arrow button to highlight the line). Enter the split amounts (the total of both lines must equal the quantity of the original split) to transfer.

Submit the transfer.

The status in the transaction's Adjustment History should now be "Pending Approval". When the transfer is approved, it will be automatically posted to the new project.

The Learning all there is to know about budget & finance can feel daunting. This week we will have open Q&A. Bring your questions and struggles. Nothing a fund manager does is off the table. Trying to figure out the source of a GL-PPM discrepancy? Can't figure out how to get your direct retro charged? Have an issue with a GL-PPM amount? Break down the line item? Need help finding a GL chart string? Nothing is off the table. Bring your questions to this Q&A session.

This course provides an overview of UC San Diego travel policy and the trip reconciliation procedure, including claiming travel expenses on a Travel Expense Report.

UC San Diego Travel: Before You Go

Faculty and staff who travel or book business travel can further their understanding of preauthorization, trip planning, and invoices, revising orders, and checking PO invoice status. This course will be especially valuable for students and staff who need to create purchase orders.

Oracle: Buying and Paying for Financial Unit Approvers

This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as reviewing for and populating POETAF information during the ordering process, approving requisitions and invoices, revising orders, and checking PO invoice status.

Financial Operations Office Hours

This week's office hours will cover credit memos - types of credit memos, why they're important, and when to use them. We'll also discuss how to handle credit memos in Oracle and reconciliation of credit memos.

UC San Diego Travel: Reporting Expenses

This course provides an overview of UC San Diego travel policy and the trip reconciliation procedure, including claiming travel expenses on a Travel Expense Report.

Default Project Payroll Office Hours

This week we will have open Q&A. Bring your questions and struggles. Nothing a fund manager does is off the table. Trying to figure out the source of a GL-PPM discrepancy? Can't figure out how to get your direct retro charged? Have an issue with a GL-PPM amount? Break down the line item? Need help finding a GL chart string? Nothing is off the table. Bring your questions to this Q&A session.

Fund Management Office Hours

This week we will have open Q&A. Bring your questions and struggles. Nothing a fund manager does is off the table. Trying to figure out the source of a GL-PPM discrepancy? Can't figure out how to get your direct retro charged? Have an issue with a GL-PPM amount? Break down the line item? Need help finding a GL chart string? Nothing is off the table. Bring your questions to this Q&A session.

Enterprise Financial Reporting

This week's Enterprise Financial Reporting will focus on the new report: Enterprise Financials. The report provides a consolidated view of financial data across all departments and units. The report includes key metrics such as revenue, expenses, and net income. Attend the presentation to learn how to access the report and interpret the data.

Office Hour Enhancements

Concur has added a new feature that streamlines two popular P-Card requests: Open a restricted Merchant Category Code (MCC) and Ship Goods to an Off-Campus Address.

Third-party services - new capability.

The third-party services will be available in a new card type called "Billing". This card type will allow you to pay for services such as rent, insurance, and legal services. This means no more having to submit these requests via Services & Support!

For more information on the new third-party services card type, please visit our support page.

Tips

Finance-related questions

Instructor-Led Training sessions, and Hot Topics.

Calendar views in Concur

Be sure to try out the different calendar views in the upper right corner!
Each Tuesday, the Weekly Digest provides important updates related to Budget & Finance, including Oracle Financials Cloud and Concur Travel & Expense. Our goal is to deliver timely information that matters to you.

Not sure where to find answers? Get started using our Support Framework.