 Bookmark or staff with financial responsibilities, identify their resources based on the following questions:

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

For support on how to use this report:


Learn how best to prepare your transactions to meet the fiscal year deadlines for the Procure-to-Pay and Travel and Equipment Asset Management. This week's office hours will cover credit memos - types of credit memos, include topics related to Accounts Receivable, Cash, Merchant Services, Project Portfolio Management (PPM), and Equipment Asset Management. The status in the transaction's Adjustment History should now be "Pending Approval"

Pro. booking travel via Concur, prepaying with the Travel & Entertainment Card, and how to take advantage of TripIt - a tool that helps organize your travel plans. Faculty and staff who travel or book business travel can further their understanding of preauthorization, travel policies, and expenses. 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 unit.

Financial Operations Office Hours will be held on every third Friday of the month. This will include open Q&A, and Hot Topics.

Thursday, April 28, 2022

Financial Operations Office Hours: 9:00am - 10:00am

UC San Diego Travel: Reporting Expenses: 1:30pm

Thursday, April 14, 2022

Financial Operations Office Hours: 9:00am - 11:00am

UC San Diego Travel: Reporting Expenses: 1:30pm

Wednesday, April 6

This week we will have open Q&A. Bring your questions and struggles. Nothing a fund manager does is off the table.

Financial Operations Office Hours: 9:00am - 11:00am

March 30: View a live demo of the new Default Project Payroll report with the BI & Financial Reporting team!

April 5, 2022

We'd like to deeply thank all of the merchant teams for your help in this year's validation cycle, and for your continued support. We have successfully completed the annual PCI validation process with our QSA. The PCI Update and Continued Merchant Support provides the most up-to-date values; as a reminder, Concur will be clearing out the Most Recently Used list.

Generally, the system lists any recent field selections in this section; however, if any GL chart string, project, or Approver fields are outdated, invalid chart string/project values that may be sitting in users' search menu for all GL chart string, project, & Approver fields.

As a best practice when completing your Request/Expense Report, search and select from the Favorite Allocation page. We've added an enhancement that streamlines two popular P-Card requests!

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Download a copy of the PCI Update and Continued Merchant Support for your records. This document provides the PCI requirements and guidelines for our merchants.

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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.