Cost Transfers for Concur Documents

If you did not provide POET information in your Concur document but now need to request a cost transfer, you can follow these steps:

1. **Review Your Concur Document**: Ensure that you have a complete and accurate record of the transaction details, including the original expenditure item, department, and cost distribution.
2. **Identify the Project**: Determine the project to which the cost transfer should be applied. This will involve checking the project budget and ensuring that the transfer aligns with the project's fiscal responsibilities.
3. **Access Concur**: Log into your Concur account and navigate to the document you wish to transfer costs from.
4. **Initiate Cost Transfer**: Look for an option within the Concur interface to initiate a cost transfer. This could be found under an option like “Manage Costs” or “Transfer Costs”.
5. **Fill in Details**: Enter the necessary information, such as the project number or name, the transfer amount, and any notes about the transfer.
6. **Submit Transfer**: Review your entries and submit the cost transfer request. This may require approval from your financial manager or department head.
7. **Monitor Approval**: Keep an eye on the status of your request. Concur will communicate the outcome of the transfer request through email or within the application.

For more detailed guidance, refer to the Concur Training FAQs and Cost Sharing FAQs. You can also consult the Oracle BI & Financial Reporting Panorama Dashboard for best practices and tips on managing cost transfers.