for the specific expenses allocated to that approver.

Financial Unit Approvers will see all expenses claimed within the document - (Request/Report Header) when creating a Concur document. By default, this Unit Approver is selected from the Approver field on the first page populate chart string information from the Request to the Expense Report. This action will automatically link the Request and Expense Report as well as Best practice when creating a Travel Expense Report is to start from the Travel Request & Expense Report views in the upper right corner!

If you have WalkMe installed, a popup will now appear when you open the bell catalog suppliers, but should not be selected in request forms. If selected in a "Do Not Use". These supplier sites are typical and expected for punchout and views in the upper right corner!

fiscal administrators, fund managers and financial managers who would like to documents as well as a quiz to reinforce concepts. This course is intended for UC San Diego Travel: Before You Go expenses course before your trip takes place.

Faculty and staff who travel or book business travel can further their information about online tools. Faculty and staff will learn about Concur PO Invoice Workflow

The new workflow will be implemented as of Monday, 10/11/2021.

Error Message #2 - Direct Retro: "Over-the-Cap cannot be distributed to

Error Message #1 - Funding Entry/update in MCOP/salary cap worksheet: made to the MCOP/salary cap worksheet. At that point, Error Message #1 allowed by the private agency/award. If a Sponsored Fund was previously remediation, a credit will be issued in the Oracle financial system for the Composite Benefit Rate (CBR) – Summer Salary Credit

Q: 

A: 

to approve or release.

Commonly Asked Questions

The new workflow will be implemented as of Monday, 10/11/2021.

Questionnaires (SAQs) on the

did not receive an invoice.

you to contact us via Services and Support if you believe that your customer(s)

affected records, while we continue to find and correct accounts. We encourage

Some Invoices Not Systematically Issued to Customers

November.

additional information is needed. This effort is expected to be ongoing through

memos and incomplete contract fields in PPM. Please be aware that these

PPM Manage Project Costs Filter by Accounting Period

When reviewing transactions in Manage Project Costs and

Correction:

transactions, a user may have experienced slowness when

Filter button.

The [Filter] button was removed in the Manage Project Costs screen, in the

the Manage Project Costs screen, the performance should be

PPM Manage Project Costs Filter by Accounting Period

4. Include the POETAF for the TO transfer only if you would like the award

3. Reason for status change request (i.e. to be able to transfer for cost

1. Requester: Learn about the approval responsibilities of requisition

Review our KBA

Introduction to Oracle Procurement & Payables eCourse

is a

Changing the Billable status of a transaction may impact the billing accuracy

To request a Billable status change, submit a Services & Support case or

To prevent Cost Transfers from getting "stuck" in workflow without the ability

a. Under the Action column, select the blue Expense hyperlink; or

Locate the approved Travel Request

PPM Manage Project Costs Filter by Accounting Period

when reviewing the funds with the following tax rates:

1. Requester: Learn about how to access and best

Review our KBA

Introduction to Oracle Procurement & Payables eCourse

is a

Changing the Billable status of a transaction may impact the billing accuracy

To request a Billable status change, submit a Services & Support case or

To prevent Cost Transfers from getting "stuck" in workflow without the ability

a. Under the Action column, select the blue Expense hyperlink; or

Locate the approved Travel Request

PPM Manage Project Costs Filter by Accounting Period

when reviewing the funds with the following tax rates:

1. Requester: Learn about how to access and best

Review our KBA

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is a