Concur & Expense

**Budget & Finance Weekly Digest**

**May 11th, 2021 - 19th Edition**

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**Getting Ready for Fiscal Close**

**University Budget Committee**

July 15, 2021 is the deadline for uploading and approving the top down numbers. You can access the budget website here: [University Budget Committee](https://budget.ucsd.edu/). Please make sure to submit your budget updates by then.

**Tips & Tricks**

1. If this expense report is a prepayment, or direct payment to an event supplier, select **T/E Supplier**.
2. If the individual to be reimbursed/paid is a non-employee student, then select **Student**.

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**Faculty and Staff**

**May 12th, 2021**

- [New Set Up Process for Flow Through Awards](https://ucscd.custhelp.com/app/answers/detail/a_id/37739)
- [Approval Flow](https://ucscd.custhelp.com/app/answers/detail/a_id/16149)
- [Oracle Cost Transfer Multi-Select Launching Soon!](https://ucscd.custhelp.com/app/answers/detail/a_id/37739)
- [Recommended Supplier](https://ucscd.custhelp.com/app/answers/detail/a_id/40844)

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**Procurement**

- **Lift PO Commitments in Oracle Procurement**
  - If you are noticing PO commitments on your PPM ledger, you may lift them by submitting a case via Services & Support to ask the POs be closed.
- **Procure to Pay**
  - You may use the service offerings: Buying Goods & Services - Oracle Marketplace PO to be closed will prevent further invoicing against the PO.

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**Travel & Expense**

- **Concur Travel & Expense**
  - **Carryover requires prior approval and/or corrective actions by department fund managers.**
  - In order to mitigate payroll expenses hitting the department default project, on May 17. Along with this release, all transfers will be final approved in the Oracle Cost Transfer module.

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**Scrip**

- **Scrip by July 15th to receive the funds back to the department account**
  - All Scrip items that are still outstanding will become stale-dated by June 26, 2021.
  - These items are automatically removed from your Scrip account.
  - Please reach out to [Services & Support](https://ucscd.custhelp.com/app/answers/detail/a_id/16149) if you have any questions or need assistance with returning Scrip.

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**Erroneous Airfare**

- **Concur Travel & Expense**
  - If you notice an erroneous airfare, please let us know via Services & Support (Travel; Concur Support). We will process the return of funds to the respective account.

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**VMRF Awards**

- **Concur Travel & Expense**
  - If the VMRF award is funded with a single line item, please ensure the expense is properly loaded to the respective profile. If you notice missing or incorrect information, please let us know via Services & Support (Travel; Concur Support).

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**Oracle Cost Transfer**

- **Oracle Cost Transfer**
  - We encourage you to participate in the next [Oracle Cost Transfer webinar](https://ucscd.custhelp.com/app/answers/detail/a_id/40844).
  - The webinar will cover the process for allocating costs to a project and how to use the Allocation Wizard. You will also learn how to view, edit and approve Cost Transfer requests.

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**User Feedback**

- **Oracle University Prepaid Airfare**
  - If you have any feedback or suggestions for improving the Oracle University Prepaid Airfare program, please let us know via Services & Support (Travel; Concur Support).

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**Other Announcements**

- **Training & Support**
  - **Oracle Cost Transfer Multi-Select Launching Soon!**
  - You will be able to choose multiple projects to be transferred at once. This feature will make the process more efficient and user-friendly.
  - **Oracle Cost Transfer Webinar**
    - **Thursday, May 27, 2021 @ 1:00pm - 3:00pm**
    - Join us for the next [Oracle Cost Transfer webinar](https://ucscd.custhelp.com/app/answers/detail/a_id/40844).

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**Contact us**

If you have any questions or need assistance, please reach out to [Services & Support](https://ucscd.custhelp.com/app/answers/detail/a_id/16149) or [UC Learning Center](https://uc.scid.edu/). We are always here to help you.

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**Confirmed Webinars**

- **May 21st, 2021**
  - [Oracle Procurement - Revising or Canceling an Order](https://ucscd.custhelp.com/app/answers/detail/a_id/40844)
  - **Oracle Procurement** - Revising or Canceling an Order. Please note that requesting a PO to be closed will prevent further invoicing against the PO.

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**New Faculty and Staff**

- **Concur Travel & Expense**
  - **University Prepaid Airfare**
    - If you are new to UC San Diego and need help with your travel, please reach out to [Services & Support](https://ucscd.custhelp.com/app/answers/detail/a_id/16149). We are here to help you.

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**Conclusion**

Thank you for reading this edition of the Budget & Finance Digest. Stay tuned for next week's edition and keep an eye out for new developments.

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**About the Weekly Digest**

The [Weekly Digest](https://ucscd.custhelp.com/app/answers/detail/a_id/16149) is a learning network dedicated to bringing the UC San Diego community together to share and crowdsource knowledge related to travel and expense management. We encourage you to participate in our discussions and share your insights with others.

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**Engage with us**

- [Follow us on Twitter](https://twitter.com/UCSanDiego)
- [Like us on Facebook](https://www.facebook.com/UCSanDiego)
- [Subscribe to our mailing list](https://ucscd.custhelp.com/app/answers/detail/a_id/16149) to receive updates on all UC San Diego travel and expense management news and events.

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**For More Information**

- [Payment Compass Registration: Timeline and Responsibilities](https://ucscd.custhelp.com/app/answers/detail/a_id/40844)
- [Training & Support](https://ucscd.custhelp.com/app/answers/detail/a_id/16149)
- [Oracle University Prepaid Airfare](https://ucscd.custhelp.com/app/answers/detail/a_id/40844)
- [Oracle Procurement - Revising or Canceling an Order](https://ucscd.custhelp.com/app/answers/detail/a_id/40844)
- [Services & Support](https://ucscd.custhelp.com/app/answers/detail/a_id/16149)