**March 23rd, 2021 - 12th Edition**

**Budget & Finance Weekly Digest**

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**Tips & Tricks**

- **Event planners** can use their **Reports**, then **Allocation Summary**. Approvers are also able to enjoy this functionality. Open the desired Expense COA/POETAF. Users can see a snapshot of all of the allocations made on an Expense Report. Details should you distribute expenses across multiple chart strings. Select Users can see a snapshot of all of the allocations made on an Expense Report.

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**Concur Travel & Expense**

- **Planning to Travel? Jet Over to the UC Learning Center!**
  - Topics include understanding the General Ledger in OFC and purpose, journal entries, general ledger transactions, and journal transactions.
  - Join us for the third webinar in a series to learn more about the General Ledger. Wednesday, March 31, 2021 @ 9:00am - 10:30am

**Fund Management: General Project Structure Options**

- **Hot Topics: Wire Payments**
  - During the event we mentioned a survey we will be conducting in March/April, but weren’t able to join us yesterday, we will be sending out a notice to all Project Managers about this change, and we strongly encourage departments to send something out to their faculty directly. Support teams will be providing notifications are reinforced from their local business offices. Support teams will be providing.

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**Financials Cloud and Concur Travel & Expense**

- **Flight****s**
  - **Guest Traveler Name**, as applicable
  - **Project PPM Budget**
  - For step-by-step guidance, see **demo**.

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**Announcements**

**Grants Cloud** - **Project PPM**

- **Adjustment Requests**
  - In general, it is not uncommon for a proposal to have an expense amount that is less than the budget amount. The Research & Sponsored Programs Office staff will not make adjustments if the amount is not reasonable. It is the responsibility of the principal investigator to ensure that the information provided is accurate. If the amount is incorrect, the principal investigator should contact the sponsor.

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**AP Invoice Holds**

- **Adjustments to Payables Invoice Tolerance Settings**
  - After months of shared frustration, IPPS made the business decision to release all of the invoices that were on hold. Understanding that users would like to begin entering data into Concur, we have found that communication to faculty is more effective when any central offices hold. Understanding that users would like to begin entering data into Concur, we have found that communication to faculty is more effective when any central offices hold. Understanding that users would like to begin entering data into Concur, we have found that communication to faculty is more effective when any central offices hold.

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**Miscellaneous**

- **New PO Supplier Email**
  - For instructions, please review the example.