Tips & Tricks

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Report ID for Expense Reports). For information on locating the Request ID or the Report ID, see our help center. Providing the Request ID or the Report ID will allow for quicker resolution of cases. For Concur documents, also check to see if the Expense Report was posted to the Receivables Aging Report to assist with identifying outstanding receivables.

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How to Claim Per Diem for Travel in Concur

Tips & Tricks

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Visit the University Procurement Card Program underestanding of buying on campus. Procurement & Payables concepts. This course will be especially valuable for individuals responsible for approving requisitions and invoices who want to further their understanding of buying on campus.

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Oracle: Buying and Paying for PO Requisitioners

This course will cover the following topics: Understanding Purchase Orders, Creating and Approving POs, Understanding Payment, and Paying for POs. This course is designed for those who are responsible for managing the procurement process within their department.

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Oracle: Buying and Paying for Financial Unit

This course will cover the following topics: Understanding Financial Unit, Creating and Approving Financial Unit POs, Understanding Financial Unit Payment, and Paying for Financial Unit POs. This course is designed for those who are responsible for managing the financial unit procurement process within their department.

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Transactions/Costs for a Cost Transfer in Oracle

This course will cover the following topics: Understanding Cost Transfers, Creating a Cost Transfer, and Reviewing Cost Transfers. This course is designed for those who are responsible for managing cost transfers within their department.

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FinU (Financial Unit) Project Default in Oracle

This course will cover the following topics: Understanding FinU Project Default, Creating a FinU Project Default, and Reviewing FinU Project Defaults. This course is designed for those who are responsible for managing FinU project defaults within their department.

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Automation of General Project Chart Strings to Create Combinations

This course will cover the following topics: Understanding General Project Chart Strings, Creating General Project Chart Strings, and Reviewing General Project Chart Strings. This course is designed for those who are responsible for managing general project chart strings within their department.

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Tasks to Projects, Project Personnel Update

This course will cover the following topics: Understanding Tasks to Projects, Creating Tasks to Projects, and Reviewing Tasks to Projects. This course is designed for those who are responsible for managing tasks to projects within their department.

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Announcements

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This notice is to confirm the upcoming deprecation of Legacy Applications. We would also refer to the Datawarehouse using existing tools such as Query Link mining support. Due to active purging activities through 2018, IFIS data queries will not capture the value goals set out initially by the replacement enterprise systems. This is very important to ensure we had real-time access to legacy data for an additional fiscal year for activities such as reconciliation and variance reporting. Coming next month, we will post this information to the monthly Financials Cloud and Concur Travel & Expense, are delivered to your inbox. Our eCourse is available through the UC Learning Center. More detailed guidance, including necessary follow-up actions and final requirements to resolve these commitments before closing a project.

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If no user action, the Request should close automatically after 60 days, should move any pending transactions from Available Expenses onto the account to UC San Diego for expenses within a reasonable period of time. You should also request for June posting at least 4 business days before the end of the fiscal year, which is located in the Receivables Aging Report.

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If you have Concur Travel or Event Requests with projects that are closing, and need to convert this Travel/Event from your project to another, follow these steps:

1. Click to view all tasks
2. Select the tasks that you wish to convert
3. Click the “Move” button
4. Select the new project to move the tasks to
5. Click “Save” to complete the process

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Additional tips for converting tasks:

- Ensure that all associated Expense Reports have been processed before moving tasks.
- If lifting commitments is a focus, below are tips to expedite this process:
  - Contact vendors, including subcontractors, for immediate billing
  - Contact UCOP Payroll representative for San Diego Campus (Legacy Financial Data)
  - Sanders, Ellen
  - Lekovish, Thach, Cam
  - UCSD representatives for San Diego Campus (Legacy Financial Data)
  - nlekovish@ucsd.edu
  - acruz@ucsd.edu
  - stemarie@ucsd.edu
  - ptrinidad@ucsd.edu

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If you have any questions or concerns, please contact us at elearning@ucsd.edu.