We've compiled a quick guide on entering your Expenditure Types quickly and easily. Expenditure Type is required for each expense entry added to the document.

Any time that a Project is used on a Concur Request or Expense Report, an exception will be generated into the GL. This will help identify all deficits regardless of dollar amount. By tabbing into the Expense or Allocation Report, an individual can identify unique recharge activities.

The Financial Deficit Report – Operating Funds

Operating Funds, Unrestricted Funds and Gift Funds. This GL-based report is run for the period impacted financial processes and reports. This report will allow identification of unique recharge activities.

The Financial Deficit Report – Sponsored Projects

Financials Cloud and Concur Travel & Expenses, are delivered to your inbox. Our aim is to deliver timely information that matters to you.

About the Weekly Digest

New to Concur? For a complete overview of the Concur application, or take a tour within Concur by selecting the "Explore Concur!" button right on the homepage. Don't see the WalkMe pop-up? Verify that you have the latest version of the Concur application installed.

To access our interactive course materials, please visit our learning platform, Blink. Please note that this page is subject to updates as new information becomes available. Refer back to the Blink page at regular intervals.

MCI Import File Best Practices and Error Handling

MCI file submitters that use MCI Builder, RMP application and manual entry of MCI data into PPM will experience delays in processing MCI files. This is caused by the Oracle validation preventing these from loading. Please take action to correct.

There has been reported issues regarding journal entries for Period 13. Any AR journals based on the latest guidance.

For more information on the approvals system in Concur, please review the Concur Approvals Overview.

Oracle Financials Cloud

This live course will include an in-depth explanation of Concur processes and features related to Oracle Financials Cloud. The course is for individuals responsible for departmental purchases who want to further their understanding of buying on campus. Please note that you must complete the "Getting Ready for Fiscal Close" section before registering.

This course has recently been updated according to campus feedback to reflect new content, include new exercises, and focus on the most key Oracle Financials Cloud features. This course is a 2-hour live session. Please schedule your time accordingly. The full July - September topic list and schedule can be found on the UCPath Hub.

Wednesday, July 14, 2021 @ 9:00am - 11:00am

How to Reconcile Salary

In an effort to provide ongoing and dedicated training to individuals who have left the department or the University, this course has been updated to include new content, include new exercises, and focus on the most key Oracle Financials Cloud features. This course is a 90-minute session. Please schedule your time accordingly.

Thursday, July 8, 2021 @ 9:00am - 11:00am

Getting Ready for Fiscal Close

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Please note that this page is subject to updates as new information becomes available. Refer back to the Blink page at regular intervals.

We've added a new section in the Weekly Digest to help prepare you for Fiscal Close. The list was curated specifically to support financial review and corrective actions by the UC Pathology Office.

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