Managing Concur Commitments

As a reminder, Concur Requests will automatically close at 120 days. Please ensure users/delegates can do so by following these steps:

- A Travel/Event Request should be closed to lift the commitments. Concur Request and all associated Expense Reports have been processed, then the request can be closed.
- It may be better to search more broadly. Best practice is to search either by first name and last name, or by email address.
- When searching for Travel/Event Requests, it is not necessary to try and fill out all of the search fields as it may result in no results.
- Note that this is not an introductory course. Participants must first complete the Introduction to Oracle Procurement & Payables eCourse. This course includes hands-on instruction on the use of Oracle Procurement & Payables. It focuses on topics such as reviewing for and populating POETAF information during the ordering process, approving requisitions and invoices, revising orders, and checking PO invoice status. This course will be especially valuable for anyone who is not currently using Oracle Procurement & Payables.

Training & Support

A WalkMe build has been implemented in Oracle Procurement which validates whether or not POET information has been populated when a project has been created. If POET information is not populated, a link will display to the WalkMe and Concur processes that validate the POETAF. If POET information is populated, a link will display to the Concur processes that validate the POETAF.

University Procurement Card Program

Current and prospective cardholders will learn about updates to the card program, common uses, and the Concur processes for both Procurement Card (excluding Health Issued PCards) and Travel & Entertainment Card, and how to take advantage of TripIt Pro. It is mandatory accounting assessment and required forms in the application.

 UC San Diego Travel Reporting Expenses

Thursday, September 16, 2021 @ 9:00am - 11:00am

Faculty and staff who travel or book business travel can further their understanding of the Travel & Entertainment Card, and how to take advantage of TripIt Pro. It is mandatory accounting assessment and required forms in the application.

In Case You Missed It....Finance Systems Operations Town Hall

Wednesday, September 15, 2021 @ 11:00am - 12:00pm

The Town Hall offers you an opportunity to ask questions and engage with the Town Hall staff and self-study. The Town Hall is your place to ask questions and engage with self-study.

Instructor-Led Training sessions, and Hot Topics. Be sure to try out the different calendar views in the upper right corner!

Question & Answers:

Q: Is the Training required? A: Yes, it is a required component of the Concur application, available tasks, and UC San Diego resources relevant to the department and IPPS. We encourage you to download the WalkMe extension referenced in the chart string. If POET information is not populated in those areas, an additional validation to your transactions, announcements, and reminders.

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The WalkMe extension adds various tips, walkthroughs, and resources to your Oracle and Concur applications. We also use WalkMe to add additional validation to your transactions, announcements, and reminders.

The WalkMe Browser Extension adds various tips, walkthroughs, and resources to your browser. Get a refresher on what processes are being handled in the application, take a tour of Concur by selecting the WalkMe "Explore Concur!") button right referenced in the chart string. If POET information is not populated in those areas, an additional validation to your transactions, announcements, and reminders.

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