As a reminder, Concur Requests will automatically close at 120 days. Please close/Inactivate Request for Travel/Event Requests that are not associated with a project. Faculty/Staff can view and lift commitments, please review our best practices regarding any closed Travel/Event Requests. For more information on viewing past activity in Concur, please contact Concur Support.

If you have any Travel or Event Requests that are associated with a project, please close the Travel/Event Request in Concur, and then follow the university’s policy for reporting travel expenses and how to submit a Travel Expense Report. This course provides an overview of UC San Diego travel policy and the program, common uses, and the Concur processes for both Procurement Card (excluding Health Issued PCards) and Travel & Entertainment Card cardholders to submit Expense Reports on a monthly basis. Campus colleagues should proceed in adding any unprocessed FY21 charges to Expense Reports in Concur and submitting for reimbursement on a monthly basis. Campus colleagues may be seeing these accrual entries to ensure financial statements present accurately. Campus colleagues should proceed in adding any unprocessed FY21 charges to Expense Reports in Concur and submitting for reimbursement on a monthly basis.

If you have any questions, please contact Concur Support.

UC San Diego Travel: Before You Go
Thursday, September 9, 2021 @ 9:00am - 11:00am
Faculty and staff who travel or book business travel can further their knowledge about Concur application, available tasks, and UC San Diego resources relevant to Travel & Entertainment Card, and how to take advantage of TripIt Pro. It is recommended that you also attend the UC San Diego Travel: Reporting Expenses course before your trip takes place.

Answers

Hall
In Case You Missed It....Finance Systems Operations Town Hall
Thursday, September 2, 2021 @ 10:00am - 11:00am
Between the preparation and implementation process for reporting travel expenses and how to submit a Travel Expense Report, our finance systems partners at the university’s central office shared an overview of the University Procurement Card Program, common uses, and the Concur processes for both Procurement Card (excluding Health Issued PCards) and Travel & Entertainment Card cardholders to submit Expense Reports on a monthly basis. Campus colleagues should proceed in adding any unprocessed FY21 charges to Expense Reports in Concur and submitting for reimbursement on a monthly basis. Campus colleagues may be seeing these accrual entries to ensure financial statements present accurately. Campus colleagues should proceed in adding any unprocessed FY21 charges to Expense Reports in Concur and submitting for reimbursement on a monthly basis.

If you have any questions, please contact Concur Support.

UC San Diego Travel: Reporting Expenses
Thursday, September 9, 2021 @ 9:00am - 11:00am
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, and learning where to submit travel expense reports. This course provides an overview of UC San Diego travel policy and the Travel & Entertainment Card, and how to take advantage of TripIt Pro. It is recommended that you also attend the UC San Diego Travel: Before You Go course before your trip takes place.

Tips & Tricks

Searching for Faculty/Staff Members
If searching for a Faculty/Staff Member Type or query, your Faculty/Staff Resource Explorer will search the Oracle Financials Cloud for the resource and the Oracle Procurement & Payables databases in Concur. Faculty/Staff Resource Explorer is an initiative to provide up-to-date information on who has the authority to approve, sign, request, or manage disbursements in the university’s budget and finance system. Faculty/Staff Resource Explorer is a mandatory accounting assessment and required forms in the application. Be sure to complete the application before applying to the UC San Diego Financial Accounting Program!

Our goal is to deliver timely information that matters to you.

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