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September 7, 2021 | 36th Edition

To avoid having your request closed unexpectedly (e.g. cost transfers, PO replacement, change orders) required both of the following:

1. Expunge requests in Concur and close them individually.
2. On a monthly basis, asking campus colleagues to submit any Expense Reports or obtain approval in Concur, any Expense Reports that haven't been final approved in Concur, etc.

Note that the fiscal year closes on June 30th. Financial statements are reported on a fiscal year (e.g. Fiscal Year 2021 ending June 30, 2021) and fiscal years are measured one year at a time. If you haven't met your year (FY) end close requirements, please expect to have them reviewed by OPAFS and potentially have charges reversed.

Apply Resources to UC San Diego Financial Accounting Program

This applies to all accounts associated with a specific business unit. The purpose of the financial accounting program is to fully professionalize the supervisory and internal audit staff.

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

The Managing Concur Commitments course provides an overview of UC San Diego travel policy and the processes for reporting travel expenses and how to submit a Travel Expense Report.

Oracle: Buying and Paying for Financial Unit Approvers

Wednesday, September 8, 2021 @ 9:00am - 11:00am

This course focuses on the efficient use of the Financial Unit Approvers in the Oracle Financials Cloud. It focuses on topics such as reviewing for and populating POETAF numbers which is a consolidated view of Office Hours, key dates, and UC San Diego resources relevant to your campus, including Concur resources. Get a refresher on what processes are being handled in the Resource Discovery section.

Oracle: Procurement Card Cardholder Training

Thursday, September 9, 2021 @ 1:00pm - 3:00pm

This course is especially beneficial for fund managers, staff and faculty. Watch the Blink video for a refresher on the requisition process and how to submit and reconcile invoices.

Oracle: Procurement Card Cardholder Training

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

This course is especially beneficial for fund managers, staff and faculty. Watch the Blink video for a refresher on the requisition process and how to submit and reconcile invoices.

Managing Concur Commitments

A WalkMe build has been implemented in Oracle Procurement which validates additional validation to your transactions, announcements, and reminders.

Explore Concur

To unlock these features. Visit Our Website

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