How to Initiate Carryingforwards and resource transactions previously in Budget & Finance Weekly Digest

Overview of Carryingforwards and Resource Transactions

Recalling Requests and Expense Reports

Use this guide to recall requests and expense reports. To recall a request, follow the guidelines in the Concur Help Center. If you wish to change the approver, you must recall the document and resubmit it. To recall the document, follow the guidelines in the Concur Help Center.

Using Firefox or a similar browser for best experience

For the best experience in Oracle, we would recommend using the Firefox browser. Google Chrome, Internet Explorer, and other browsers may result in a poor user experience.

Tips for using Firefox

Tip: Be sure to verify your document’s status in Concur before submitting a request. If you need to make changes to a request, recall it and resubmit.

Viewing and Managing Your Requests

You can view various flags associated with suppliers, including determining if a transaction is in the “reconciled” state. To view these flags, open the transaction in Concur and click on the “Flags” tab. The flags will be displayed in the “Supplier Flags” section.

Using Oracle Fiscal Closing Tools

If you have Concur Travel or Event Requests with projects that are closing, and all associated Expense Reports have been processed, then your Travel/Event Requests should be closed to lift the commitments. Concur users/delegates can close requests by following these steps:

1. Go to the “Requests” tab in Concur.
2. Select the request that needs to be closed.
3. Click on the “Close/Inactivate Request” button.
4. Confirm the closure by clicking on “Yes”.

Path to Fiscal Closing Tools

If you have any questions or concerns about Fiscal Closing Tools, please contact the Financials Cloud and Concur Travel & Event Support Team.

Additional Resources

For more information on Fiscal Closing Tools, please refer to the Concur Help Center. You can also contact the Financials Cloud and Concur Travel & Event Support Team for assistance.

Concluding the Fiscal Period

Please note that the end of the fiscal period is July 1, 2021. All transactions must be processed before this date to avoid penalties.

Information on Departmental Action and Cutoff dates for Fiscal Closing 2020-21

We've added a new section in the Weekly Digest to help prepare you for Fiscal Closing 2020-21. This section includes information on departmental actions and cutoff dates.

For more information, please refer to the Concur Help Center. You can also contact the Financials Cloud and Concur Travel & Event Support Team for assistance.